

Platform R-6.0



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1. About this Guide

1.1. Document History

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

Product Version	Date (Release Date)	Description
Platform 1.0	June 9 th , 2015	First Release of the document
Platform 2.0	February 18 th , 2016	Updated document
Platform 2.1	May 11 th , 2016	Updated document
Platform 2.5	November 9 th , 2016	Updated document
Platform 2.5.1	January 3 rd , 2017	Updated document
Platform 2.5.3	March 16 th , 2017	Updated document
Platform 3.0	August 31 st , 2017	Updated document
Platform 3.0	October 31 st , 2017	Modified document
Platform 3.2	February 2 nd , 2018	Updated document
Platform 3.5	April 15 th , 2018	Updated document
Platform 3.6	August 20 th , 2018	Updated document
Platform 3.7	October 10 th , 2018	Updated document
Platform 3.8	December 1 st , 2018	Updated document
Platform 4.0	December 31 st , 2018	Updated document
Platform 4.2	March 25 th , 2019	Updated document
Platform 4.3	April 24 th , 2019	Updated document
Platform 4.4	June 7 th , 2019	Updated document
Platform 4.5	August 5 th , 2019	Updated document
Platform 4.6	November 15 th , 2019	Updated document
Platform 5.0	February 17 th , 2020	Updated document
Platform 5.2.0	August 21 st , 2020	Updated document
Platform 6.0	February 26 th , 2021	Updated document

1.2. Overview

This guide covers:

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

1.3. Target Audience

This guide is aimed at system administrators who manage the BDB Business Intelligence Platform (popularly known as the BDB Decision platform).



2. Introduction

2.1. Introducing the BDB Platform

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

Customers having multiple branches can efficiently manage data by creating a single space for each branch within this platform. They can also view the information collected from multiple branches via dashboards and BI Stories. They can use Data Preparation and Data Science modules to prepare and organize their existing data to gain actionable insight into their business.

2.2. Supported Web Browsers

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

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

3. Getting Started with the BDB Platform

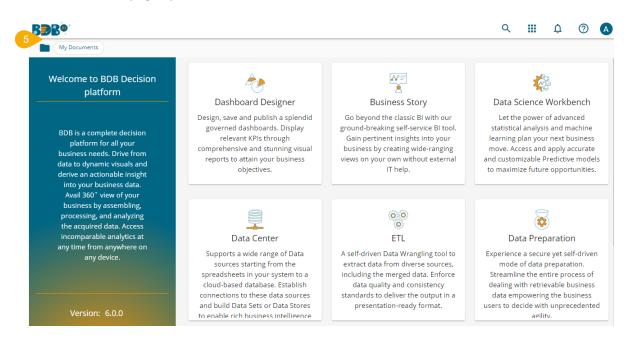
This section explains how to access the BDB Platform and a variety of plugins that it offers:

- i) Open BDB Enterprise Platform Link: https://app.bdb.ai
- ii) Enter your credentials to log in.
- iii) Select an 'Auth Type' option using the drop-down menu.
- iv) Click the 'Sign In' option.





v) BDB Platform homepage opens.



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

3.1. Forgot Password Option

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

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

Decision Platform
🐸 Email / User Id *
• Password *
Auth Type Enterprise
Sign In
Copyright © 2015-2021 BDB (BizViz Technologies Pvt Ltd)

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

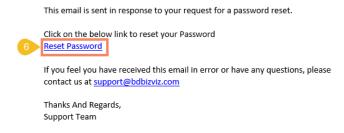


Decision Platform
2 Forgot Password?
Please enter the registered email address to reset your password.
3 Email * admin.user@bdb.ai
Sign In
Copyright © 2015-2021 BDB (BizViz Technologies Pvt Ltd)

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



vi) Click the link from your registered email.



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

You have confirmed ownership of the BDB accourd Please reset your password to get access.	Decision Platform
	You have confirmed ownership of the BDB accour Please reset your password to get access. New Password *

Copyright © 2015-2021 BDB (BizViz Technologies Pvt Ltd)



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



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

3.2. 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 displays to inform that the user has consumed the permitted sessions and, a click on the '**Force Login**' would kill all those active sessions.

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



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

Permitted already co		
Force login will sessions.	terminate a	Il the active
Cancel		Force Log



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

3.3. Platform Homepage

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

3.3.1. AI Search

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

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



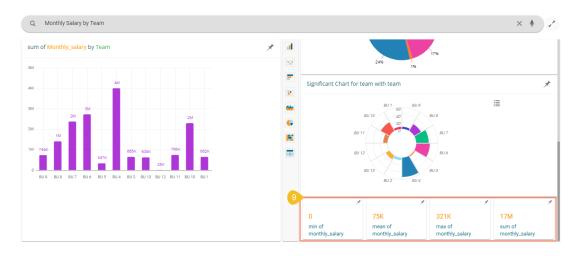
- iii) Type a specific data query in the given search space.
- iv) Click the 'Search' icon provided on the Search space or click the 'Enter' key.
- v) The searched data query result appears in the form of a View on the screen.
- vi) The user can visualize the same data using any of the given charting options.
- vii) The right side of the screen displays searched query in a default display choosing another charting category. (E.g., Mixed chart in this case).



viii) The user gets deeper insights into the selected dimension like cumulative impact and dimension distribution respectably via Pareto and Pie charts.

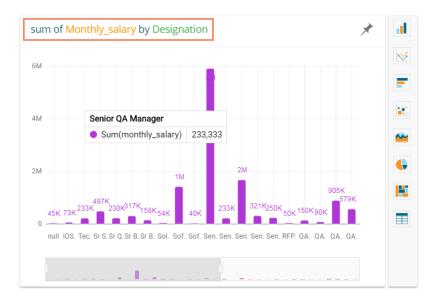


ix) Various stacks get displayed at the bottom right side of the screen.



3.3.1.1. Data Drill Using AI Search

The user can search for data up to any granularity level. E.g., The following images display data up to the deeper granularity level. Query 1: Sum of the monthly salary by Designation









Query 3: monthly salary by designation for the selenium skills with Experience is more than 10 years



3.3.1.2. Adding a Searched View to a Story

- i) Navigate to a searched view.
- ii) Click the 'Add to Story' icon from the Searched view.

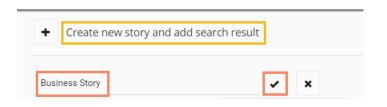




iii) The user gets two choices out of which they can select either of the choices to proceed.

story	Showing 21 out of 89	
new story	BU 10	reactive ming or story
Predictive Hiring BI Story 2	 Sum(usd_billing) 79,346 Predictive Hiring Story 	Retail Story
Sales Story	Sample Story	SampleStory
Story	Test Story	VLCC Story

a. Create a new Story to add the Searched View: If this option is selected the user needs to provide a title for the new story and click on the 'Create' icon as displayed below.



b. Select an existing Story from the list to add the Searched View: If this option is selected the user can search for a specific Story using the Search bar and then select the Story document from the displayed list.



Q story	Showing 22 out of 90	
Frederive mining of Story	Frederive mining of Story 2	Frederive mining story
Retail Story	Sales Story	Sample Story
SampleStory	Story	Test Story
VLCC Story		

- iv) In both cases, the user gets directed to the Searched result page.
- v) A message appears to confirm that the searched view is added to the selected story.

um of Usd_billing by Te	am	×	sum of team by team	7
00K			100K	2 100
90K		79K	вок	7 9/K 80
80K 70K	эк		60K	48K 60 60
60K			40K	
50K			20K 13K 16K 18K 1	3K 27K
40КЗЗК З0К				0
20K 16K	16K 13K 1	7K 16K	BU12 BU5 BU13 BU2 BU9 BU	J1 BU11 BU8 BU7 BU6 BU10 BU4

Note:

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

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Q Type here to start Al Search			٢	

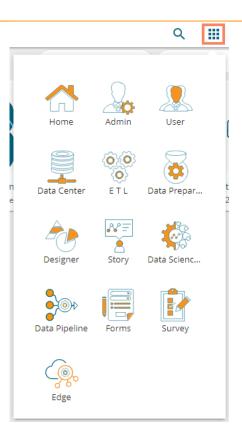
b. Until the user adds the searched View to any Story, it does not get saved for future use. The user needs to search the data again when required.

3.3.2. Apps Menu

The Apps Menu displays all the available applications.

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





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

3.3.3. Notification Option

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

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



		Q	
2	Last 3 Notifications		3 See All
F	admin Datastore Notification f Loaded data to datasto		
	admin Datastore Notification f Failed to load datastore		
	admin Datastore Notification f Failed to load datastore		

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

Noti	fications		
	Search Q	C 🗊 🖬 🍙	C 👔 🖬 🖬
	admin Datastore Notification for Sample Data Store	Prom: admin Sent: 2/26/20, 12:31 PM 12:31 PM 2/26/20	12:31 PM 2/26/20
	admin Datastore Notification for Sample Data Store	Loaded data to datastore 'Sample Data Store' successfully! 12:00 PM 2/25/20	12:00 PM 2/25/20
	admin Datastore Notification for Sample Data Store	11:22 AM 2/24/20	11:22 AM 2/24/20
	admin Datastore Notification for Sample Data Store	11:18 AM 2/24/20	11:18 AM 2/24/20

Icons provided on the inbox window:

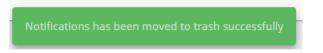
Icons	Name	Task Assigned
Î	Trash	Displays messages in a list of all the deleted messages
C	Refresh	Receives the latest messages
Î	Delete	Moves the selected messages to the Trash folder
$\mathbf{>}$	Mark unread	Marks messages status as 'unread'
	Mark read	Marks messages status as ' read '

- v) Click the 'Delete' $\overline{\bullet}$ icon from the header panel of the notification inbox.
- vi) A message window appears to confirm the action of moving the selected notification to Trash.
- vii) Click the '**Yes**' option to move the notification(s) to Trash.

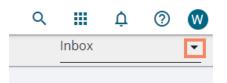


	Trash notification	
1	Do you want to move the no	otification(s) to Trash ?
		Cancel Yes

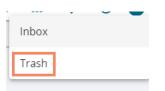
viii) A message appears to confirm that the selected notification(s) has been moved to the Trash folder.



ix) Click the drop-down option to get the '**Trash**' option.



x) Click the 'Trash' option.



xi) The notifications under the Trash folder get displayed. (the latest notification opens in detail (by default).

No	tifications	Trash
	Search Q 🖬 🖬 🖬	Subject: Datastore Notification for Sample Data Store
	admin Datastore Notification for Sample Data Store 12:01 PM 12/21/19	From: admin Sent: 12/21/19, 12:01 PM
C	admin Copying Document 6:01 PM 5/21/18	Loaded data to datastore 'Sample Data Store' successfully!

Icons provided on the Trash-box window:

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

Note: The alert messages display while performing the following actions: a. Moving messages from inbox to trash



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

3.3.4. Help Menu

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

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



- iii) A context menu opens with the following options:
 - 1. Developer Network
 - 2. Documentation
 - 3. Guided Learning
 - 4. Privacy & Legal

	Q		Ċ	0
	2	Develope	r Netwo	rk
:6	E	Documen	ntation	
	Þ	Guided Le	earning	
ly	0	Privacy &	Legal	

- iv) The user gets directed to the option based on the selection from the Help context menu.
- v) E.g., The '**BDB Documentation and Help**' page of the BDB website opens while selecting the '**Documentation**' option from the menu.

BBB®	What We Do	Products	Solutions	Data Science	Discover BDB	Connect to BDB
BC)B Docume	ntation	and He	lp		
Version 5.0 •		Relea	se 5.0			
					1	
				USE	R GUIDES	
				• Pla	tform Administrate	or Guide

3.3.5. User Profile

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

i) Navigate to the Platform homepage.



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

1-B					(۹		Ļ ¹⁴	2
	My Documents > Al	Data 🗲		Search	A	adm			
				3	8		n@bdbizvi ccount t	z.com	
В	S BDB Recruitment	Dashboard BDB Recruitm	Dashboard BDB Dark The		ሀ	Sign (Dut		

Note: '**My Account**' and '**Sign Out**' options are explained under topic no.8 and 10 of this document. Please refer to the suggested topics to get more information on these options.

3.3.6. Available Documents

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

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

BBB®				Q	III 🖧 💿 🚺
My Documents >	1			Search Docume Q Sort by:	None 🗸 \Xi 🕀
 Public Documents Shared Documents Favorites 		ور			
Shared Documents	Sample Folder	Story A	Dashboard 0 views	Sample Form 0 views	Sample Folder

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

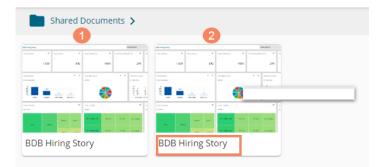


Shared Documents >	2
SparkSQL 0 views	Story 3 views

Use the right-click on both the document to get the credited operations. The document shared using the '**Copy To**' option gets all the permissions to modify it, while the document that is shared using the '**Share with**' option gets no permission to modify it.

Shared Documents >	
SparkSQL 0 views	

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



• Favorites

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

Note:

- a. The 'My Documents' space opens by default while opening the BDB Platform homepage.
- b. The Public Documents contain a sample folder by default.



Public Documents >	
	₩ 888
BDB SAMPLES	File Import 💦

3.3.7. Navigation Bar

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

i) The user gets a navigation bar/ search bar on the platform homepage.

BBB®					Q		¢ 1	?	N
My Documents >				Search Documents Q	Sort by	: None '	•	Ŧ	Ð
		€ ⁶ 889™							
Shared Documents	Sample Folder	Story And Story Story	Dashboard 0 views	Sample Form 0 views		Sample Fo	older		•

- ii) Insert the title of the document you want to search in the given space.
- iii) Click the '**Search**' 🔍 icon.
- iv) All the available documents with the matching search term display as 'Search Result'
- **E.g.**, The following image displays a document containing the word **"Story"** in its title:

4 Back Search Result	2 story	3.0
Story ~~ 0 views		

3.3.8. Sorting Documents

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

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

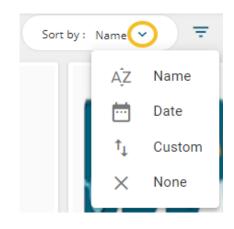
- 1. Alphabetical/Name (Ascending and Descending)
- 2. Date (Ascending and Descending)
- 3. Custom



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

BBB [•]			Q		¢3	?	0
My Documents >	earch Documents	٩	Sort by	: None	ગ	Ŧ	Ð

- ii) A context menu opens with the following sorting options:
 - a. Name: Sort documents by their name in ascending or descending order (Ascending is the default order).
 - b. Date: Sort documents by date by using this option (Ascending is the default order).
 - c. Custom: Manually drag and change the order of documents.
 - d. None: It removes the impact of the applied Sort by option.



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

My Documents >				Search Documents Q Sor	t by: Date 🗸 \Xi 🕀
	BBR O'				₩ 888®
Shared Documents	NewDatasheet 7 views	SALES II views	Sample Records 43 views	JubiDatasheets 🗀	story N 5 views
	€ ~~~~				
Mobile Complete Feat 4 views	story Arrows	emp_time_series 2 views	Sample Data Sheet	Data Sheet Dashboard 0 views	Sample URL 🕞 1 view

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



Custom	n Order				×
E	SALES	^	~	\uparrow	\checkmark
	Sample Records	^	~	↑	\checkmark
BBB®	NewDatasheet	^	~	↑	↓
	JubiDatasheets	^	~	↑	\checkmark
∎ %%)®	story	^	~	↑	\checkmark
Close	Mobile Complete Features	^	~	₼	J.

Note:

- a. The platform homepage displays the saved documents as 'My Documents' by default.
- **b.** A '**Search Bar**' has been provided on the Platform homepage to search the specific folders and files.
- **c.** Documents can be sorted in ascending order by default; users need to click on the 'Name' option again to sort the documents in the descending order.

4. Administration

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

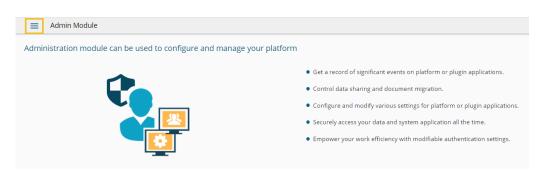
4.1. Accessing the Administration Module

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





- v) The user gets directed to the 'Admin Module' page.
- vi) Click the '**Menu**' \equiv icon.



- vii) A panel appears with various administration options on the left side of the page.
- viii) Click the drop-down sign v provided next to the concerned admin option to display the subcategories for the same. By clicking the drop-down sign, it gets changed into the upward sign as displayed in the below given image:

BBB®					Q		Ć ^{ss} (0 🗸
Document Management								
Configurations	🗸 ed i	to configure and	manage your platfor	m				
🚓 Authentication	~			• Get a record of significant events on platf	orm or plug	in applica	ations.	
📒 Audit Trail	~			 Control data sharing and document migra 	tion.			
Language Mapping	~			 Configure and modify various settings for 	platform o	plugin a	pplications	
- -		25		 Securely access your data and system app 	lication all 1	he time.		
m Migration	× I	8- I		Empower your work efficiency with modif	iable authei	ntication	settings.	
Session Manager								
Schedule Monitor								
Server Monitor								
👼 License								

4.2. Administration Options

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

4.2.1. Document Management

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

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

	_		
1	ĥ	Document Management	
	00	Configurations	~
	<mark>ہے</mark> ،	Authentication	~
		Audit Trail	~



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

Enterprise Showing 19 out of 19
۹
= 1 5
÷ 1 5
÷ / 6
i < 🗅
■ < □
• • •
€ <
■ < □
■ ~ ·⊔

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

Note:

- a. The administrator must exclude users from a shared document before deleting the document.
- b. Share/Exclude options can be applied only to the files, the folders available under the 'Document' Management' module do not support these actions.
- c. Steps to Share a document Click the 'Share' icon -> the Share Documents window opens -> Search and select Users/Group(s)/Excluded User(s) -> Click the 'Save' option.

Share Documents		×
t Users Search User		
krish 🕲		
Group		
Search Group testUserGroup		
Excluded		
Search Exclude Users		
	Cancel	Save

d. Steps to Copy a document:

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



'Save' option

e Copy Documents Search User Prakash & priya &		×	Å
BDB Hirring Story	Cancel	Save	

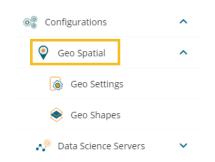
4.2.2. Configurations

This section covers configuration details for various platform plugins.

4.2.2.1. Geo-Spatial

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

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



• Settings

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



Geo Settings		
	Google Setting	^
	Google map key * AlzaSyADrD2CvOhA9Yet5yskK0tmwpV2000iXBU	
		Clear Save
	Leaflet Setting	^
	Map URL * http://(5).tile.osm.org/(z)/(x)/(y).png	
	Attribution * © OpenStreetMap contributors	
		Clear Save

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

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

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

Admin Module		(+)	Polygon
Search			م
Id	UserName	Actions	
10059776	USA Country	i i	
10059777	USA State Level	i i	
10059778	USA States FM	Î.	
293470208	USA Geo Shape	i i	
		Items per page: 10 💌 1 - 4 of 4	<

- d. The 'Create New Geo Shapes' page opens.
- e. Enter the following information:
 - i. Shape Name: Title of the geo shape (map)
 - ii. Geometry Type: Select anyone Geometry type from the drop-down menu (out of 'Polygon' or 'Line')
 - iii. Area Type: Select an area-type using the drop-down menu



- iv. Choose File: Browse a shapefile from the system and upload (Only 'json 'and 'js' formats are supported)
- f. Click the **'Save' i**con to save the inserted details.

Create New G	eo Shapes				⊖ 5 €
	Create Geo Shapes			^	
	Shape Name *				
	Geometry Type *	-	Area Type *	·	
	Choose File No file chosen				

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

Note:

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

i	Polygon
1.	FUIYgUII

ii. Line			
Admin Module			
Geo Shapes		- Poly	gon
Search		Line	
Id	UserName	Actions	
10059776	USA Country		
10059777	USA State Level	i i	
10059778	USA States FM	i	
293470208	USA Geo Shape	i i	
		ltems per page: 10 ▼ 1 - 4 of 4 < <	> >1

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

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

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



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

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

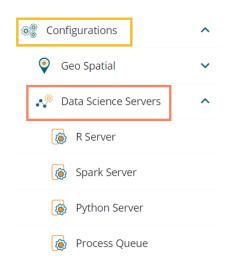
Delete shape file			
Do you want to delete selected shape file ?			
CANCEL	DELETE		

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

4.2.2.2. Data Science Servers

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

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



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



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

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

≡	Admin Module							
R Serv	ver					+	Test	
	Server name	Cores	Workflow	Scheduler	Actions			

- e. Click the 'Create New Server' 🕂 icon
- f. A scrollable window opens asking Basic Information for new R Server
- g. Provide the following information to configure a new R server:
 - i. IP Address: IP address of the R-server
 - ii. Port: R-Server's port number
 - iii. Username: Enter a username to log in to the R- server
 - iv. Password: Enter the password for the above username
 - v. R Server Name: Provide the R- Server address
 - vi. Provide HTTP URL for R-Bokeh: Provide R Visualization URL
 - vii. Elastic Search Port: Provide an elastic search port number
 - viii. R Visualization URL: Provide HTTP URL for R-Bokeh
 - ix. Enable Parallel Processing: Avail this option by using the enable/disable button
 - x. Set as Default: Select this option by using a checkmark in the box
- h. Click the '**Test**' option to verify the R-Server connection.



Server		Test Save
Server Information		^
IP address *	Port *	
		Can contain only numbers. Maximum 0/5 I
User name *	Password *	
R server name *	Elastic search port 9200	
HTTP URL for R-Bokeh * https:// <ip:port domainname="" rviz=""></ip:port>		
Enable parallel processing		
Number of cores *		

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

	•	Ļ ⁵⁵	?	W
Successfully connected to R Server				
	Test	Sa	ve	←
	rest	50	ve	

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



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

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

Note:

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

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

• Spark Server Settings



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

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

🞯 🖁 Configurations	^
Geo Spatial	~
🧬 Data Science Servers	^
🔞 R Server	
Spark Server	
Python Server	
Process Queue	

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

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

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

Admin Module		
reate Spark Server		Test Save 🗲
Server Information		~
Internal server protocol * HTTP	Port *	
User name *	Password *	_
Spark server name *	Application *	
Jetty configuartion URL *		

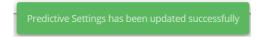
i. A message appears to assure the connection.



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



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



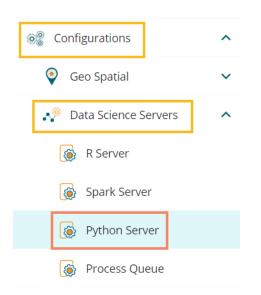
v. The newly configured Spark server gets added to the 'Spark Server' page.

Admin Module			+ Test Save
Server name	Default	Actions	
172.31.41.103	•	Z . I	
Spark Server	۲	× =	

• Python Server

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

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



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



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

- e. The 'Create Python Server' configuration window opens.
- f. Provide the following information:
 - i. Host: Host address of the Spark server
 - ii. Port: Spark server's port number
 - iii. Username: Enter a username to log in to the Spark server
 - iv. Password: Enter the password for the above username
 - v. Python Server Name: Provide Python Server Address
 - vi. Elastic Search Port: Provide the elastic search port number
 - vii. Web Socket URL: Provide the web socket URL link
 - viii. Visualization URL: Provide the Visualization URL link
 - ix. Python Server Protocol: Select a protocol option by using the radio option
- g. Click the '**Test**' option to verify the connection.

← Test Sav
^
*

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

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

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

Predictive Settings has been updated successfully



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

≡	Admin Module			
Python Server				
[Server Name	Default	Action	
	pythonServer	۲	2.1	
	Python Server	0	2.1	

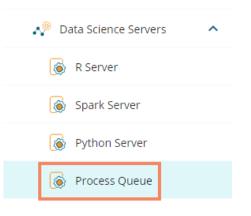
Note:

- a. Click 'Edit' 🖍 icon to modify an existing python server configuration
- b. Click the '**Delete**'¹ icon to remove the selected Python server details from the list.

Process Queue

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

i) Click the 'Process Queue' option from the Data Science servers.



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

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



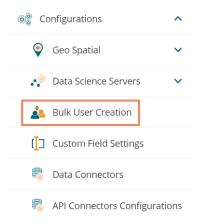
- iv) A warning message appears, asking whether the user wants to flush the queue.
- v) Click the '**YES**' to set the count of currently running processes to Zero for the Data Science Workbench.

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

4.2.2.3. Bulk User Creation

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

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



- ii) The 'Bulk User Creation' page opens.
- iii) The Bulk User Creation gets completed in two steps, as explained below: <u>Step- 1 Download the Standard Template</u>
 - 1. Navigate to the 'Bulk User Creation' page
 - 2. Click the 'Download' icon.





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

oose the updated
0

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

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

Steps-2 Upload a file with multiple usernames

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

	ct a file with multiple usernames in the proper format.	
 Click the 'Upload' option. 		
 A success message appears to con 	firm the user creation.	
Choose Files UserTemplate.xlsx	Select Sheet UserTemplate	30

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





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

User Management					N	lew
User Groups		Users	Type Enterprise	 Status Active 		•
Search Group	۹	Search User			†_	۹
Showing 44 out of 44		Showing 42 out of 42			•	
All Groups	5	User 3		1	09	•
UserGroupgrpfed	∕⊘ ≙	User 2		1	00	Î
GroupshareTestywqspj	/ 🖉 🗎	Vidya		1	09	Î
UserGroupgrpeiz	/ 🖉 🗎	krish		1	00	

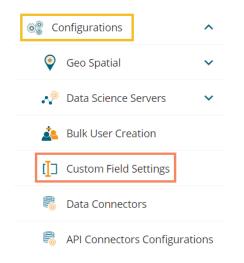
Note:

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

4.2.2.4. Custom Field Settings

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

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



- b. The Custom Field Settings window opens.
- c. Provide the following information for each custom field:
 - i. Key: Provide the key value of the custom field.



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

ield Settings				+
Custom Field Informatio	n			
Key	Input Type	Description	Mandatory	Delete
State	Manual	▼ state of user	No	• ×
country	User LookUp	▼ country of user	No	• ×
component	Manual	component	No	• ×
Gender	User LookUp	 gender 	No	. ×

Note:

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

4.2.2.5. Data Connectors

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

i) Click the 'Data Connectors' option from the list of Configurations.

Document Management
🛞 Configurations 🔨
🔮 Geo Spatial 🗸 🗸
🥠 Data Science Servers 🗸 🗸
🙇 Bulk User Creation
[] Custom Field Settings
👼 Data Connectors
👼 API Connectors Configurations

ii) The 'Data Management Server Settings' page opens.



- iii) The users can set the Max Fetch Size for the listed data sources.
- iv) Click the 'Update Settings' icon to save the entered Max Fetch Size for data.

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

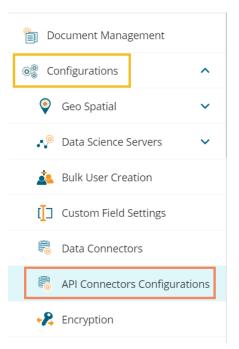
v) Click the '**Refresh'** icon to erase the entered information.

Aanagement Settings		(
Data Connector Information		^
MySQL (Max fetch limit) *	MsSQL (Max fetch limit) *	
Oracle (Max fetch limit) *	Hive (Max fetch limit) *	
Hana (Max fetch limit) *	OData (Max fetch limit) *	
Spark SQL (Max fetch limit) *	Cassandra (Max fetch limit) *	
Red Shift (Max fetch limit) *		
Note : Please enter the fetch limit between 5000 to 92233720368547758	300.	

4.2.2.6. API Connectors Configurations

This option allows the users to configure API data connectors.

i) Click the 'API Connectors Configurations' configuration option from the list of admin options.





- ii) The Connector Configurations page opens displaying the list of the API connectors.
- iii) Select an API Connector option.
- iv) The required configuration details display for the selected API Data Connector.
- v) Click the 'Save' option.

Admin Module	
Connector Configurations	
Amazon Marketplace	Amazon Marketplace
BingAds	Access id * AKIAIEM3IHRVAG7M2WNQ
DropBox	Secret Key *
Facebook	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
FacebookAds	Save
Firebase	
Fitbit	

vi) A message appears to confirm the connector configuration.



4.2.2.7. Encryption

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

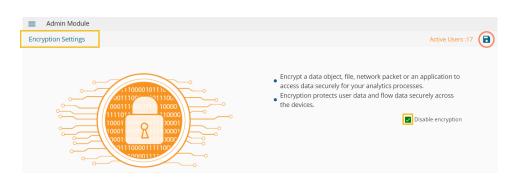
The Encryption module provided under the list of admin options allows users to enable or disable encryption.

i) Click the 'Encryption' configuration option from the list of admin options.





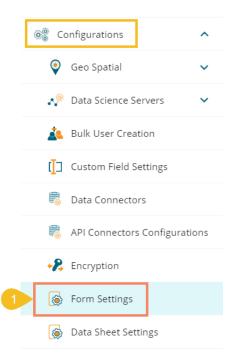
- ii) The 'Encryption Settings' page opens.
- iii) Enable Encryption by a checkmark in the box.
- iv) Click the 'Save' 🗟 icon.



4.2.2.8. Form Settings

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

i) Click the 'Form Settings' option from the Admin options panel.



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

Form Settings		Clear Save
3	Enter the database details for saving the data of forms User Name * form_user *Use Read only ordential Password *	^
	Host *	
	Database Name *	

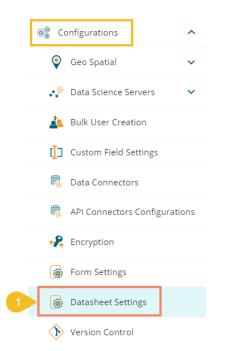
Note:

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

4.2.2.9. Data Sheet Settings

The Data Sheet Settings option helps the administrator to configure the Data Sheets templates.

vii) Click the 'Data Sheet Settings' from the configurations admin option.



- viii) The Data Sheet Settings form opens.
- ix) Enter the database details to save the form data as mentioned below:
 - 1. Username: Use read-only credentials
 - 2. Password: Use a valid password
 - 3. Host: Provide Host address
 - 4. Port: Provide the port number
 - 5. Database Name: Provide a database name
- x) Click the '**Save**' option to save the entered settings information.

atasheet Settin	85	Clear Save
	Enter the database details for saving the data of datasheet	^
	Uier Name * admin	
	Password #	
	Hest *	
	Port*	
	Database Name *	

4.2.2.10. Version Control

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

- i) Click the 'Version Control' option from the Configurations options.
- ii) The Version Control page opens.
- iii) Provide the Host address of the GitLab link.
- iv) Select the '**User Credential**' as Token type (if the user can select the '**Private Token**' option if the user has access to the Private Token from Git Lab).
- v) Provide an email address of the GIT Lab account.
- vi) Provide a valid password.
- vii) Put a checkmark in the given box to generate and store a new Private Token.
- viii) Click the '**Test**' option.

E Admin Module		
Version Control	Clear Test	
Version Control Information	^	
1 Host * https://gitlab.com		
2 Token type User Credential O Private Token		
3 Email * 4 Password * anagha.kn@bdb.ai		
5 I understand that, this will auto generate a new Private Token that will be stored and will be used	l further to proce	

ix) A success message appears.

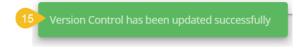


- x) The Private Token option gets selected.
- xi) The Token Key from the Git Lab account gets entered by default.
- xii) Select a Project from the drop-down menu.
- xiii) Select a branch from the drop-down menu.
- xiv) The 'Save' option gets enabled. Click the 'Save' option.



n Control		Clear	Test Save
Version Control Information		^	
Host *			
https://gitlab.com			
Token type O User Credentration Private			
User Credentiar Private	Token		
11 Token Key *			
12 Select a Project *	13 Select a Branch *		
12 Select a Project * VCS_BDB	VCS branch	~	

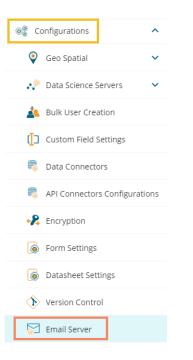
xv) A success message appears to inform the version control update.



4.2.2.11. Email Server

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

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



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



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

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

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

- vi) Click the '**Update settings**' 🖬 icon to save the email server information.
- vii) Click the '**Clear all Setting**' ^C icon to erase the entered configuration details.

4.2.2.12. Password

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

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

🛞 Configurations 🔨
🔮 Geo Spatial 🗸 🗸
Nata Science Servers
🙇 Bulk User Creation
Custom Field Settings
👼 Data Connectors
API Connectors Configurations
😪 Encryption
Form Settings
Datasheet Settings
Version Control
Email Server
Password



- ii) The 'Password Settings' page appears.
- iii) Provide the following information:
 - Password Expiry (Days): Set password validity (in days)
 - Password Strength (: Set password length (6 to 16)
 - **Password Reuse:** Set a limit to restrict the user from using an old password (last 3 passwords cannot be reused)
 - Login Failures (No. of User Login Failure): Set the number of chances provided to the user for logging in with wrong passwords (Maximum login chances provided to the user are 3. The user account gets blocked if a user enters the wrong password more than 3 times.)
- iv) Click the '**Update Password**' 🔽 icon to save the entered password information.

2	Admin Module	€ ∎
	Password Information Password Expiry*	^
	0 Password Strength * 6	
	Password Reuse * 3 Login Fallures(before account is locked) * 6	- 1

v) Click the '**Refresh**' \mathbb{C} icon to erase the entered password information.

Admin Module	
sword Settings	<u>c</u>
Password Information	^
Password Expiry *	
Password Strength *	
Password Reuse *	
Login Failures(before account is locked) *	

Note:

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

4.2.3. Authentication

The administrator can do basic settings for windows AD, CA Clarity, and AWS Cognito accounts by applying the below given settings:

4.2.3.1. Active Directory Configuration

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



- i) Click the 'Authentication' option from the list of admin options.
- ii) The following authentication options appear:
 - i. AD Configuration
 - ii. CA PPM Configuration
 - iii. AWS Cognito Configuration
- iii) Select the 'AD Configuration' authentication option.

🗎 Document Management	
Seconfigurations	~
승금 Authentication	^
AD Configuration	
CA PPM Configuration	
AWS Cognito Configuration	
💾 Audit Trail	~

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

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

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



BBB®			۹		Ċ.	0	(
Admin Module	Ad Configuration	n Settings Saved					
Active Directory Settings							
Configuration	2 Parameters	3 Sync Configuration		- 4 Gr	oup Con	figurat	ior
Parameters					^		
First name							
Last name							
Description							
Custom Fields					~		
			Back	Next			

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

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

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

Admin Module				
Active Directory Settings				
Configuration	2 Parameters	3 Sync Configuration		4 Group Configuratio
Parameters				~
Custom Fields				^
User property		Active directory property		Delete
User property		Active directory property		×
+ Add row				
			Back	Next

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



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

Admin Module					
Active Directory Settings					
Configuration	Par	ameters	3 Sync Co	onfiguration	4 Group Configuration
	AD Group list		AD User list		
	empl		Search		
	employee		Select All	3/6	
			✓ bijeesh.op		
			Shyam		
			🖌 kalanidhi.m		
			archana.ms		
			georjo.johan		
			vidhyashree.bhosale		
					_
					Back Next

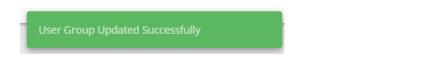
xxvi) A success message appears to confirm that the user list has been updated.



- xxvii) The Group Configuration tab opens.
- xxviii) The selected AD user list appears.
- xxix) Select any user group from the AD Group list.
- xxx) Click the 'Save' option.

Admin Module			
Active Directory Settings			
Configuration	Parameters	Sync Configuration	Group Configuration
	BDB Group list per User_Perm Group Permissions Permission Check 5 permissions PAPermissions	Selected AD User list	
			Back Save

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



xxxii) Open the User Management module for the selected AD user the configured group gets listed in the '**Add Users to Group**' list.



User Management				
User Groups		Update User		Add Users to Group
Search Group	۹			Search
Showing 23 out of 23				Select all
All Groups				User_Perm
User_Perm	/ 🖉 🛢	Short Name * shyam	Full Name *	Admin Role
Admin Role	ê			□ bl_group

4.2.3.2. CAPPM Configuration

This section explains how to configure Clarity.

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

0	Configurations	~
of	Authentication	^
	AD Configuration	
1	CA PPM Configuration	
	AWS Cognito Configuration	n
l	Audit Trail	~

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

Admin Module CA PPM Settings		
3 CA PPM Information	2 CA PPM - Sync Configuration	3 Group Configuration
		C 、
4 User name *		
5 Password *		
6 CA PPM server URL *		
7 User access NQuery *		



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

	Ч		Ψ	Ŷ
CA PPM Settings Saved				
2 CA PPM - Sync Configuration		- B G	roup Con	figurati
Clarity user list			,	
Search				
Select All 0/0				
N				
	Bac	k	Next	

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

CA PPM Settings		
CA PPM Information	2 CA PPM - Sync Configuration	Group Configuration
	Clarity user list Search	
	Select All 7/141	
	dashboard	
	i≊ test	
		Back Next

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



Admin Module		
CA PPM Settings		
CA PPM Information	A PPM - Sync Configuration	3 Group Configuration
BDB Group list	Selected Clarity User list	
Search	Search	
UserTestGrouphdz UserTestGroupved UserTestGroupnwo UserTestGroupnwo UserTestGroupIm UserTestGroupIm UserTestGroupzg UserTestGroupvd UserTestGroupyd UserTestGrouppat UserTestGrouppat UserTestGrouppd UserTestGrouppd	Select All 1/7 dashboard test	
		Back Save

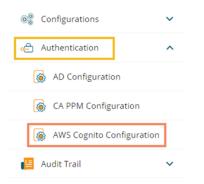
Note:

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

4.2.3.3. AWS Cognito Configuration

Follow the below given steps to configure the AWS Cognito settings:

i) Select the '**AWS Cognito Configuration**' option from the Authentication drop-down menu.



- ii) The 'AWS Cognito Settings' page opens displaying the Configuration tab.
- iii) Provide the following information to configure the AWS Cognito Settings:
 - a. Access Key
 - b. Secret Key
 - c. Region
- iv) Click the 'Next' option.

Admin Module		
Configuration	2 Sync Configuration	3 Group Configuration
Configuration Access Key *		c ^
Secret Key *		
Region *		
		Next



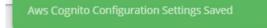
v) A success message appears to confirm the action.

Aws Cognito Configuration Settings Saved

- vi) The user gets redirected to the 'Sync Configuration' tab.
- vii) Select a user group from the displayed AWS Group list.
- viii) Select users from the AWS User list by putting the checkmarks in the boxes given next to the usernames.
- ix) Click the '**Next**' option to proceed.

Configuration		2 Sync Configuration	Group Configuration
	Aws Group list	Aws User list	
	ub	Search	
	ubiqPortal	Select All	3 / 60
	ubiqweise	☑ 0da4b959-1d5a-4986-957d-5366e2d83ebb	
	ubiqthingUserPool	↓ 1b42bd90-6414-4393-a108-988ee548b3fe	
		3418ea4d-b70a-425f-b1b8-b53d78db68ee	
		4d0691e5-db48-4fb2-9ad7-f2ae6bd287fb	
		4eeb3cfd-96a5-4aca-90d2-363f856bdb77	
		610a7fa4-e2a6-411a-a4e8-ead7da5d5c03	

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



- xi) The Group Configuration tab opens.
- xii) The selected AWS user list appears.
- xiii) Select any user group from the AWS Group list.
- xiv) Click the '**Save**' option.

Configuration		Sync Configuration	3 Group Configuration
	Aws Group list	Selected Aws User list	
	toy	Search	
	Toyota_Admin	Select All 1/	2
	Toyota_test	user2	
		user3	

xv) A success message appears to confirm the action.

Jser Group Updated Successfully



4.2.4. Audit Trail

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

- i) Click the 'Audit Trail' option from the list of admin options
- ii) Two options appear under the Audit Trail.
 - 1. Log Status
 - 2. Audit Log Table

Document Management	
	~
₀ Authentication	~
📔 Audit Trail	^
log Status	
🧕 Audit Log Table	
📆 Language Mapping	~

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

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

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



it Trail List	vern	na 🔻 11/11/20	019 💼 11/18/2019	🖻 📿 Search	
Message Id	Request	Response	Audit log	Details	
ddcefd474a7aed4671c31	1fb8 [Request]=[pluginSer	vice]= spac null	null	0	
cb5101a8ea165b29b4cb	4c7c [Request]=[getalluse	rs]= spaceke[response]=UserNam	ne:null,Statu null	0	
e2caf7d7acee0fb261a73	b9b [Request]=[getAudit]	railSettings][response]=UserNam	ne:null,Statu null	0	
5a676bf2aeb37fd424978	8724 [Request]=[getMonit	erData]= sp null	null	0	
309fdd22932d685fd8cce	ee50 [Request]=[getMonit	erData]= sp null	null	0	
ebd16cae898aca510602	fbb8 [Request]=[getMonit	erData]= sp null	null	0	
			items per page: 10	▼ 1-10 of 31 < < >	>

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

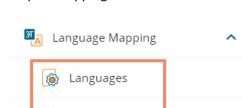
Audit Trail List	verma	✓ 11/11/2019	11/18/2019		getlist		9
Message Id	Request	Response	Audit log		Details		٦
ad41ac317d52	2e5cf10d88 [Request]=[getlist	tview]= spac[response]=UserN	ame:null,S null		•		
1bc0b1ff00c2c	b15a475e [Request]=[getlist	tview]= spac[response]=UserN	ame:null,S null		6		
			Items per page: 10	▼ 1 - 2 of	2 <	< >	>

4.2.5. Language Mapping

ЭT

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

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



Mapping Table

4.2.5.1. Languages: Adding more Languages

i) Click the 'Language Mapping' option from the list of Admin options.



- ii) Choose Languages option to add languages.
- iii) The Language Settings page opens displaying the selected language(s).

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

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

Language Settings	B
	Choose the required languages from the dropdown.
ROZ	These selected languages will be available in the language-mappings page to create mapping-table which can be consumed in dashboard.
	 Click the 'Save' option to save the newly selected language(s).
	Search language
	Hindi(India) 🍪 Tamil(India) 🕲 Gujarati(India) 🕲 gr
	Greek(Greece)

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



4.2.5.2. Mapping Table: Language Mapping Part

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



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

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

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



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

					۹		¢ ⁵⁷	0	W
	Admin Module	8 Language	setting has been saved						
9	Language Text Mapping				~	Search			٩
	Language Name * Gujarati	 Key	Gujarati(India)	Edit	Delete				
	Key *								
	Selected Languages								
	Gujarati(India)								
	Save								
							_		

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



■ Admin Module
Language Text Mapping
10 Language Name * Gujarati
11 Key * Year wise Expense and Rev
Selected Languages
12 Gujarati(India) વર્ષવાર ખર્ચ અને આવક
13 Save

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

BBR®			۹		¢ ⁶⁷	0	(
■ Admin Module							
Language Text Mapping			←	Search			
Language Name * Gujarati	Кеу	Gujarati(India)	Edit	Delete			
Key * 15 Year wise Expense and Rev	Year wise Expense and Revenue	વર્ષવાર ખર્ચ અને આવક	1	i i			
Selected Languages							
^{Gularatlindia)} વર્ષવાર ખર્ચ અને આવક							
Save							
					_		

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

Key	Gujarati(India)	Edit	Delete
Expense	ખર્ચ	1	
Revenue	મહેસૂલ	1	i i
x Axis Title	એક્સ અક્ષનું શીર્ષક	1	
Y Axis Title	વાય અક્ષનું શીર્ષક	1	i i
Year	વર્ષ	1	i i
Year wise Expense and Revenue	વર્ષવાર ખર્ચ અને આવક	1	Ŧ



4.2.5.3. Configuring the Dashboard Settings

i) Select a saved dashboard using the Designer plugin.

BBBO E Desig	gner						
+ New -	Workspaces (3) 🕒 C	۹	Dashboards (14)				Q
🚊 Manage	All Dashboards				-	-	•
🗁 Open 🗸	Finance	î	Map chart	£.	0	Î	:
★ Preferences	· ·	-	filter_saver	ħ	٥	Î	÷
H Save as	Workspace1	Î	Filter saver	f.	6	I	:
Help	Campaign Analytics 🧪	Î	Data Drill	(†)	0	Î	:
🖒 Exit	Trash	×	Custom Component	T.	0	î	:
				_	_	_	
			Drill-Funnel-type	ſţ.	0	Î	:
			Hide and Show	ſſ	٥	Î	:
			Language Mapping	ſ.	0	Î	÷

ii) Access the '**Title**' properties of the dashboard and make sure that the title description is provided in the "{}" brackets (if not then modify it accordingly)

Title	
Title Box Color :	
Show Title Box :	
Show Title :	Image: A start and a start and a start a st
Title Bar Height :	40
Description :	{Year wise Expense & Revenı
Font Color :	
Font Size :	11
Font Style :	Normal 🔻
Font Weight :	Bold •
Font Family :	Roboto 🔻
Align :	Left 🔻
Text Decoration :	None 🔻

Note:

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



Column1	$\Box f_x$
Connections Con	nection-1 • C
Search	Category
Expense	Revenue
Revenue	Series
Year	Expense
	Year
	Year
Properties	Year
Properties Field Name :	
	Indicator
Field Name :	Indicator

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

	Dashboard	×
	Border	
	Cache	
	Global Font And Themes	
	Gradient	
	Language Mapping	
12	Enable : Hide Curly Braces : Select a Mapping: 3	
	Size	

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

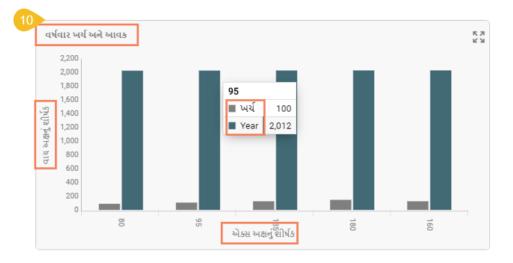
4 Langua	ge Mapping	Selection			×
5 Mapping Li	st	Gujarati			
			6	Save	Cancel



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

Lan	nguage x +		╔╻╻
	Script	Default field values	0 × 🦯
	1 sdk.applyLanguageMapping({ 2 //"isEnabled": "true",		
	<pre>8 "language":"Gujarati(India)", 4 //"hideBrackets": "true", 5 });</pre>		¢
			t≡
			00
			Q

x) The dashboard title and other descriptions get translated into the selected language.



Note:

- a. The old dashboards do not open while using the Mapping option. The users need to create a new dashboard to access this functionality.
- b. The users can use the Language Setting functionality for the below given dashboard charting components:
 - 1. Title and Subtitle description
 - 2. X-axis and Y-axis description (second Axis description)
 - 3. Inbuilt Legends, Timeline Legends.
 - 4. Legend component and static legends
 - 5. Title of filters
 - 6. Header name of Grids
 - 7. Pie chart without a category: Legends
 - 8. Tooltips and custom tooltip
 - 9. Export, Filter Saver, Url button, Bullet, Gauge, Semi gauge titles

4.2.6. Migration

The Migration option is provided to migrate visual reports, governed dashboards, Predictive Workflows,

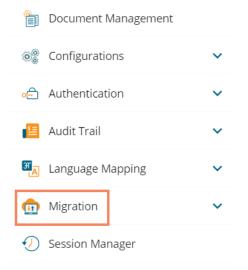


Scripts, and Models to another space. The Migration admin option has two main categories:

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

The users need to configure the SFTP server settings to accomplish the migration task.

i) Click the 'Migration' admin option.



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

igration Migration	^
SFTP Settings	
G Document Migration	
SW Migration	

This section explains the step by step process of Migration.

4.2.6.1. Migration SFTP Settings

- i) Click the 'SFTP Settings' option.
- ii) The Migration SFTP Settings window opens.
- iii) Provide the required Migration information:
 - a. Host
 - b. Port
 - c. Username
 - d. Password



- e. Start path
- iv) Click the 'Test' option to verify the connection.

Migration SFTP Settings	(C Test Save
Migration Information	~	
Host *		
Port *		
User name *		
Password *		
Start path *		

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

	۹ 🛚		¢ ⁶⁷	?	W
Connected Successfully					
	(C	Test	Sav	re

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



4.2.6.2. Document Migration

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

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

Steps to migrate a document:

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



C	Migration	^
	SFTP Settings	
0	G Document Migration	
	G DSW Migration	

ii) Click the 'Export' option from the next page that opens in the sequence.

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

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

Note:

- a. If you the folders list, then the user needs to select a specific file from a folder, then only the 'Download' icon gets displayed.
- b. Only stories and dashboards display the download icon; the listed folders do not display the download icon.
- v) A success message appears after the download process to confirm the download of the selected file in the SFTP server.

Admin Module	nkaaded in SFTP server
Migration - Document Export	My Documents 🝸 🕐 🗧
My Documents	
Search in documents	٩
Finance Overview	A Davidoard 🛃
Finance Overview Bio-Metric Attendance	d Dasmocars ₹ Story ₹

- vi) Sign In as a different user to the server or space where you need to import the baf content.
- vii) Navigate to Migrate SFTP Settings.

viii) Configure the SFTP location (SFTP location for the source and destination account should be the same to use the document migration functionality)



BBB®	II 🖓 🛛 🛛
Admin Module Migration SFIP Settings	William Martin
	6 My Account
8 Migration Information	i About
Host * 192.168.71.252	U Sign Out
Part* 22	
User name * ftpuser	
Password *	
Sort path * /home/ftpuser	

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

	≡	Admin Module		
	Migr	ation - Document Import		
9	fin	۵	Document Name: Finance Overview	
		Finance Cockpit3306140902428934150.baf	Query services Names Data Store Names Document Version	• 3.2.1
		Finance Dashboard Template3306140902432	Workspace Present	∘ true
		Finance Overview33061409024309362694.baf	 Migrate your Dashboard in Designer Migrate 	workspace
		ODC Finance Dashboard33061409024340983		
		PR_ODC_Finance_Dashboard3306140902434		
10		Finance Overview3306688128614483467.baf		

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

BD R =	Admin Module	Migrated Successfully		III 4 ¹¹ 🔿 🔞
	Export Document	Export	Import Document	Import

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



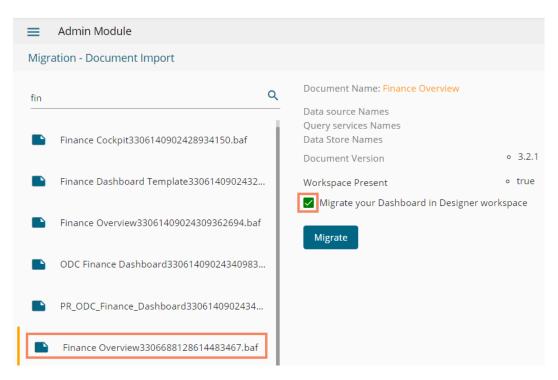
BBB®						¢" (?	w
My Documents >				Search W	/illiam Martin		
Shared Documents 13	Finance Overview	Business Story 4.5	Sample Folder 4.5	B My	Account out n Out Sample Fo	older 4.2	
Published Dashboard 3.8	Sample Folder 3.7	Sample Folder 3.5	Business Stories 3.2.1 to				

Note:

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



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





BBR ^{®®®}	Desig	gner 🕂								
+ New -		Workspaces (3)	\oplus	C	۹	Dashboards (1)				Q
💼 Manage		All Dashboards				Finance Overview	(†)	0	Î	:
🗁 Open 🗸		Finance			Î					
★ Preferences		Workspace1								
🗎 Save as					Î					
Help		Campaign Analytics		/	Î					
😃 Exit		Trash			×					

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

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

ingData DB		
Jser Name * bdbizviz.com		
assword *		
•••••		
P/Host * Database Name		
Note: If database name is not o	provided, it will be taken from th	e dataset internally.

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

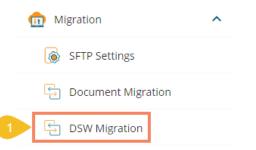
4.2.6.3. DSW Migration

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

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

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





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

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

- iii) The Export Section for DSW Migration opens.
- iv) Select a Data Science Workspace to display the list of Workflows (By selecting 'All' option workflows from all the Data Science workspaces display)
- v) Select the Workflow(s), Script(s), or Model(s) using the respective lists (If the selected workflow contains script and model components, then those components get selected by default)
- vi) Click the 'Export' option after selecting the desired workflows, scripts, and models.

	🗮 Admin M	Module						6	
3	DSW Migratio	n - Export					4 All	Export	←
		Workflows			Scripts		Models		
	WF_		۹ א	-		۹	Search model	۹	
		Select all			Select all		Select all		
		model_wf_3.8		\checkmark	K-Means++_copy		HousePrice		
		model_wf_3.8_with model			K-Means++_copy_1554375646		Something		
		Performance WF_Binary Class					FIFA Model		
	5	WF_KmeanScript					NN_TestModel		
		WF_KmeanScript_1554375647					Vlccpdfmodel		

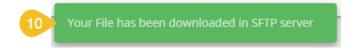
Note: The following example displays that by selecting a Workflow from the list the related script gets selected by default.

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

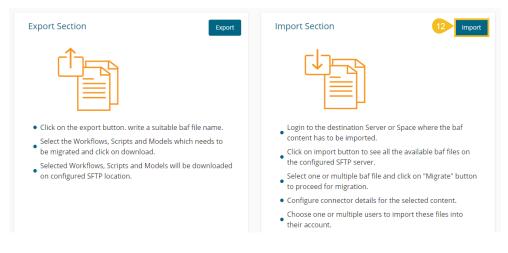


10		
0	Save As	
	Please enter	file name
8	Kmeans_Mig	ration
l	Cancel 9	Ok

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



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



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



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

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

xvii) Configure the Data Connector details.

xviii)Click the 'Test' option.

6 Con	DSW Migration - Import figure data connector neans_Migration330615073280.baf		
	mysql_DB		
17	Database type	Database name	
	mysql	professional professional	
	Target IP	Target port	
		100	
	Target user name	Target password	

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

BBB [®]	Q		¢24	0	V
Admin Module					
DSW Migration - Import					←
Configure data connector					
Kmeans_Migration330615073280.baf					
mysqLD8					
2 Done					
You are now done. Back					
		Ba	20 Ick	Next	

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



	DSW Mig Search User Wi	ration - Import			+ م
		User Name	Email Id	Last Login Date	
21		Will		1554368717924	
				Back Nex	æ

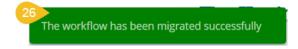
- xxiii) Select an option out of Overwrite and Replicate to treat the duplicate content (if in case it happens to be duplicate).
- xxiv) Click the '**Import**' option.

🚍 Admin Module	
DSW Migration - Import	←
What action you would like to take with duplicate content ? 23 O Overwrite Replicate 24 Back	Import

xxv) A confirmation message appears.

e content ?	
Confirm Duplicate	
	CANCEL CONFIRM

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



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



BBB®		९ 🎹 🛱 🕐 (
Data Science Workbench 🔞	► C +	William Martin
≡ C K Q	Create New Workflow	William Martin
Saved Workflows		My Account
WF_KmeanScript_1554375647		() About
WF_KmeanScript		U Sign Out
Test Workflow		
🚹 K means		
O Algorithms		
🕵 Custom Scripts		
🔺 📡 Saved Scripts		
% K-Means++_copy_1554375646	(#)	
🕵 K-Means++_copy	Component Console Summary Result Visualization Propert	ties ±

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

4.2.7. Session Manager

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

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

BBB®		
Docume	ent Management	
🎯 Configu	rations	~
合 Authent	ication	~
📒 Audit Tr	ail	~
🛯 🚬 Languag	ge Mapping	~
igratic migratic	n	~
Session	Manager	
📆 Schedul	e Monitor	
🛼 Server N	Nonitor	
👼 License		
👰 🛛 API Clier	nt Registration	

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



Active	e Sessions					Admin	
	Active	Admin Session				Search	٩
		Name	Email Id		Active sessions		
		nik	nikhil.verma@bdb.ai		1		
		sadhana s	sadhana.s@bdb.ai		2		
		jubil	jubilant.vr@bdb.ai		4		
				Items per page: 5	▼ 1 - 3 of	3 < <	> >1

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

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

vii) The selected user's session(s) gets killed, and a success message appears to inform the same.

viii) The user gets removed from the Active Admin Session.

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

Note:

- b. Users to whom the '**Kill Session**' option has been applied log out their sessions without any notification. The users need to log in again to the BDB platform.
- c. Use the drop-down menu to filter the displayed list of the Active Session as per **Admin** or **User** as displayed below:

Admin	3
User	



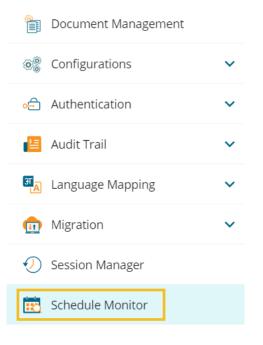
d. Use the 'Search' bar to search a specific user(s) from the displayed list of Active Sessions.

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

4.2.8. Schedule Monitor

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

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



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

Schedule M	onitoring	12/10/20	19 🖻	12/10/2019	<u> </u>	Search	Q
	Name	Status		Action			1
	nlp hiring	•			tivate		
	testSchedule	•		• De	ectivate		
	jira store newly	•			tivate		
	nlp_hiring_data	•		• Ac	tivate		
	6dec	•		• Ac	tivate		
		1	ltems per page: 8	▼ 1 - 8 of	966 <	$\langle \rangle \rangle$	I



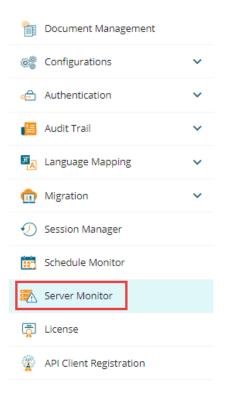
iii) Search and display specific scheduled data store(s) using the 'Search' space.

Schedule Mo	nitoring	12/10/2019	12/10/2019	<u> </u>	store r	٩
- 1	Name	Status	Action			
	Store Refresh	•	• Acti	vate		
	Store Refresh	•	• Acti	vate		
	Mssql Store Refresh check	•	• Dec	tivate		
		ltems	per page: 8 💌 1 - 3 o	of 3 🛛 🕹	< > >1	

4.2.9. Server Monitor

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

i) Click the 'Server Monitoring' option from the list of Admin options.



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



Gateway	Core	Data Science Servers	Data Service	Scheduler	F	ython	Pipeline & Data Prep	Consun
							OS Memory	
	-0-	Current Heap Size	110 MB	Committed Virtua	l Memory	3 GB	35%	
	110	Committed Heap Size	1920 MB	Free Physical Men	nory	20 GB		
		Max Heap Size	1920 MB	Total Physical Mer	mory	31 GB		
Search Bund	le							٩
Search Bund			Start Id	Version			Status	٩

4.2.10. License

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

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

Document Management	
Configurations	~
🚓 Authentication	~
💾 Audit Trail	~
Ianguage Mapping	~
m Migration	~
Session Manager	
Schedule Monitor	
🧞 Server Monitor	
License	
API Client Registration	

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



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

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

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

Follow the below given steps to configure the displayed License options

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

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

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

b. Update License

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

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

	e license key cense key here *					
Note : Er	nter the license key rec	eived in the mail from	BDB support t	eam and click Up	date button.	
Cance	2 Update					

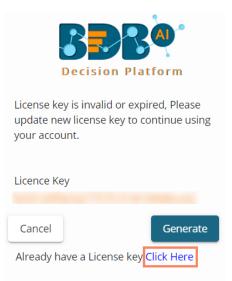


Note: The same workflow of License options is provided on the BDB Platform login page to facilitate the new users and the (existing) users who wish to renew their expired licenses with BDB.

1. Click the 'Generate' option to get a new private key (which needs to be shared with the support team at support@bdb.ai to receive the License Key.

Decision	Platform
License key is invalid o update new license ke your account.	· · · · · · · · · · · · · · · · · · ·
Cancel Already have a License	Generate e key Click Here
Copyright © 2015-2020 BDB	i (BizViz Technologies Pvt Ltd)

2. Choose the '**Click Here**' option, if you have already received the License key from the BDB support team.



4.2.11. API Client Registration

The API Client Registration option helps the user to register and save the specific details of API Clients. The API Client Registration form requires a specific data set link published as service to complete the registration process.

i) Navigate to the 'API Client Registration' option from the Administration panel.



Document Management	
Configurations	~
₀ ⊖ Authentication	~
📒 Audit Trail	~
Anguage Mapping	~
m Migration	~
Session Manager	
Schedule Monitor	
🤁 Server Monitor	
🔁 License	
API Client Registration	

ii) The API Client Registration page opens.

TOYOTA				Q		¢	N
Admin Module							
Client List	2 AP	I Client Registration			New	Sa	ve
Search Client	Q	Client Name *	Client Email *				
Search Clienc							
		App Name *					
		Request Per Hour *	Request Per Day *				
		Select The Services Entitled *			*		

- iii) Provide the required details of the API Client for registration.
- iv) Select the entitled services from the drop-down menu.
- v) Click the '**Save**' option.

API Clie	ent Registration		New 4 Save
	Client Name * Sample API Client	Client Email * admin@xyz.com	
3	App Name * Sample App		
	Request Per Hour * 100	Request Per Day * 1000	
	Select The Services Entitled * mysql_serv1		-

Note: The 'Select the Services Entitled' will display the data sets published as service using the 'Data Center' module of the platform.

vi) A notification message appears.



Client Registration saved successfully.	
---	--

vii) The API Client details gets saved under the Client List.

	🗮 Admin Module		
	Client List		
_	Search Client		Q
6	Sample API Client	⊠ / î ±	1
	Jatin	⊠ / î ±	
	Company A	⊠ / i ±	
	Sandeep	⊠ / i ±	
	mysql_24_1	⊠ / î ±	
	mysql_24	⊠ / ī ±	
	serv_jubi	⊠ / ī ±	

5. User Management

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

5.1. Accessing the User Management Page

i) Select the '**User**' plugin from the Apps menu.





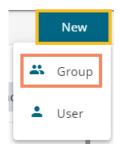
ii) The User Management landing page opens.

BBB [®]					Q		Ļ ⁸¹	0
User Management								New
User Groups		Users	Type Enterprise	Status Active		•	t↓	
Search Group	۹	Search User						c
Showing 75 out of 75		Showing 22 out of 22						
All Groups		Testinguser				1	0	J
UserGroupgrpbsp	/ 🖉 🗎	sujee				1	\oslash	3
UserGroupgrpsas	/ 🖉 🗎	killsession				1	\oslash	3 📋
UserGroupgrpbta	/ 🖉 🗎	migTestUserDestn				1	\oslash	9 🔳
GroupshareTestukbsml	/ 🖉 🗎	migTestUserSource				1	\oslash	3 🔳
UserGroupgrpqsy	/ 🖉 🗎	Chetan				1	0	9
UserGroupgrpfpkwaf	/ 0 🔒	jubilant				1	0	J 🔳

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

5.2. Creating a New User Group

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



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

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



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

New Group		
Name * Sample Group		
Description		

c. Add User to Group:

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

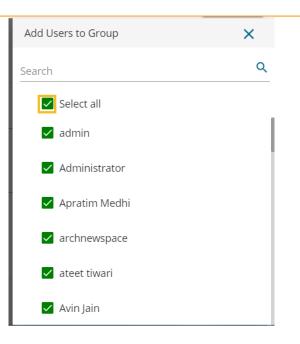


- ii. A new window opens with a list of all the existing users to that space.
- iii. Select User(s) by using a checkmark in the box from the displayed list of users.

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

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

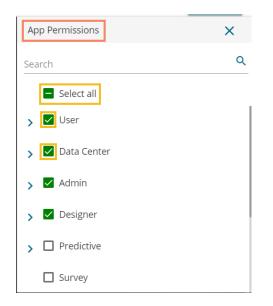




d. App Permission:

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

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



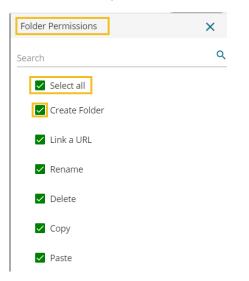
e. Folder Permission:

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



rmissions			
ssign folder	permissions	Assign	

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



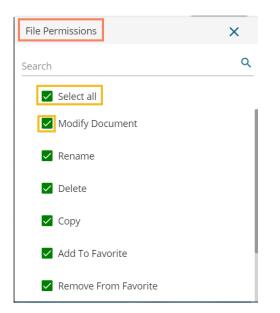
f. File Permissions:

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



Assign

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



ii) Click the 'Save' option provided for the User Group.



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

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

User Management				
User Groups				
Search Group				С
Showing 26 out of 26				
All Groups				
Sample Group	1	\oslash	Ê	
only DD permimssion	/	\oslash	Ê	
nan	1	\oslash	Ê	
test1security	1	\oslash	Ê	
Designer		\oslash	Ê	

Note:

- a. The administrator gets a common 'Save' option to save all the provided permission settings.
- b. Users can apply the following actions on a created user group.

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



A message appears to confirm that the user group has been updated successfully with the new

permissions.

User group has been updated successfully

i) The concerned group gets created with the selected permissions.

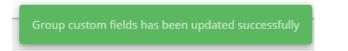
5.2.1. Assigning Group Custom Fields

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

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

User Groups		2 Assign custom	fields to group users	
Search Group Showing 26 out of 26	c	3 Group Name	Sample Group	
All Groups		4 Select Custom Fields	country	T
Sample Group	10	5 Manual	Keywords	
only DD permimssion	1 🖉 🗎		India 😺 USA 🕹	
nan	1 0 🗎	6 Users		
test1security	/ 🖉 🗎	Allows to assign cust 0 Custom Field Assigned		Assign
Designer	/ 🖉 🗎			
TestUserGrp	1 0 🗎			Cancel Save

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



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



User Management	
Liser Croups	
User Groups	
Search Group	۹
Showing 84 out of 84	
Poweruser	/ 🗸 🗎
testUserGroup	/ 🗸 🔒
Kpmg Group	2 🗸 🗎
UserGroup	/ 🗸 🗎
Viewer Role	Ê
Admin Role	Ê

5.3. Creating a New User

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

🚢 Group	
💄 User	

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

New User		Cancel Save
_{Email} * bdbuser@bdb.ai		
Short Name *	Full Name *	
user	BDB User	
Description		
Password *	Confirm Password *	



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

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

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

l
l

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

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

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



Custom Fields
state of user
country of user
component
gender
Server
user language
caller display name
skill
userid *

xi) Click the 'Save' option

New User	Cancel	Save
		- 1

xii) A success message appears.



xiii) The newly created user gets added to the user list.

				N	lew
Users	Type All Users	Status • Active	•	t↓	
Search User					Q
Showing 42 out of 42					
BDB User		Enterprise			
dataprep		Enterprise			Î

Note: The user types for the created users also reflect in the user list.

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



Note:

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

5.3.1. Default User Role

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

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

New User		Cancel Save
_{Email} * defaultuser@bdb.ai		
Short Name * duser	Full Name * Default User	
Description		
Password *	Confirm Password *	

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

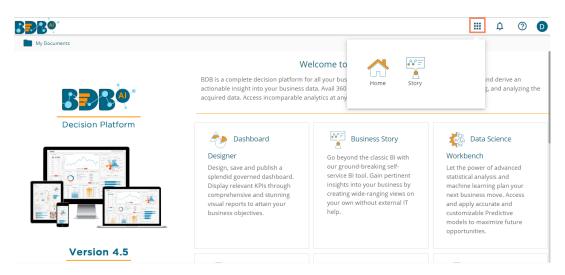
(Users	_{Type} Enterprise	Status Active	.			
(Ļ	
	Search User						
∕ √ ₿	Showing 38 out of 38						
	Default User			1	\oslash	Ð	Î
/ / 🖬	BDB User			1	\oslash	Ð	Î
1 🗸 🖉	ataat tiyaad				0		-
/ / 🔒					0	•9	-
	Harsha Balan			1	\oslash	Ð	
	Georjo.johan			1	\oslash	Ð	Î
1 🗸 🖌 🗎	manohar				0	0	
Ê				· ·	U		-
	Parnal Dudul			1	\oslash	Ð	Î
		Image: Second system Image: Second system	Image: Constraint of the second se	Image: Second secon	Image: Constraint of the second se	Image: Second	Image: space

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



Decision Platfo	r m
Email *	
defaultuser@bdb.ai	
Password *	
Auth Type	
Enterprise	~
Forge Sign In	ot Password ?
Copyright © 2015-2019 BDB (BizViz Tech	nologies Pvt Ltd)

ix) Click the '**Apps**' option. The new user can access the platform homepage, but not the platform plugins.



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

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

5.4. User Status

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

- i) Navigate to the User Management page.
- ii) Users can see two drop-down menus.
 - a. Type: It contains the following authentication types as drop-down optionsi. Enterprise



ii.	Window AD	
iii.	CA PPM	

- b. Status: It includes the following user status as drop-down options
 - i. Active
 - ii. Blocked
 - iii. Expired
 - iv. Deleted

Users	Type Enterprise	Status • Active	-	t↓	
Search User					Q
Showing 36 out of 36					
ateet tiwari			1	0 0	
Harsha Balan			1	00	•
Georjo.johan			1	0 0	•

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

5.4.1. Activating an Expired User Account

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

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

6. Data Center

Before you create a visualization and start analyzing the data, it is needed that you first connect BDB to your data. BDB Decision Platform supports connecting to a wide variety of Data. Your data might be stored in spreadsheets in your system, in relational databases, or stored to a cloud database source such as Google Analytics, Amazon Redshift, or Salesforce. The BDB users can establish connections to these Data Sources and build Data Sets and Data Stores that enable rich business intelligence and robust analytics.

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

6.1. Data Connector

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

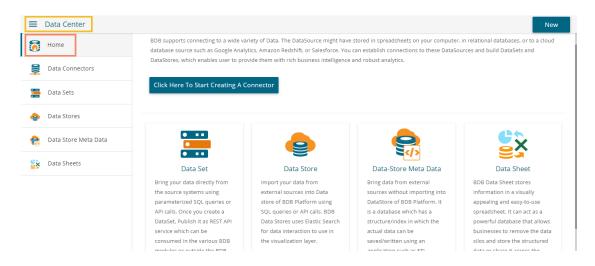


6.1.1. Creating a Data Connector

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



ii) The Data Center homepage opens.



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

OR

Select the 'Data Connectors' option from the 'New' context menu (as displayed below).

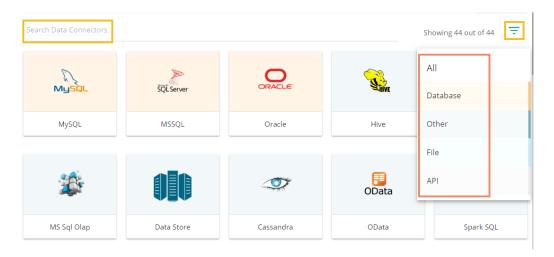


				New
databases, or to a cloud databas	e source such as Google Analytic	ce might have stored in spreadshe s, Amazon Redshift, or Salesforce. ser to provide them with rich busii	9	Data Connector
Click Here To Start Creating	A Connector			Data Set
click here to start creating			•	Data Store
				Data Store Meta Data
	9		ŝ	Data Sheet

- iv) A page opens with all the available data connector types.
- v) The user can search a specific connector type using the 'Search' bar (E.g., MYSQL) or

Click the 'Filter by Category' = icon to get various categories of data connectors.

vi) Select a category from the displayed menu.



vii) The Data Connectors page gets customized based on the selected category (E.g., the following image displays all the available data connectors from the Database category).

Data Center					New
🛜 Home	Search Data Connectors				Showing 3 out of 44
Data Connectors	6	5]	
Data Sets	MySQL	SQL Server	ORACLE		
🕒 Data Stores	MySQL	MSSQL	Oracle		
🧙 Data Store Meta Data				-	
🙀 Data Sheets					

- viii) By selecting a connector type, the user needs to configure that connector.
- ix) Fill in the required details for the selected data connector.
- Note: The configuration fields may vary based on the selected category of the data connector.x) Verify the data connection and save it by clicking the 'Save' option.
 - E.g. The following images display details to be filled to create a MySQL Data Connector.



_			
	MySQL Data Connector		
0	Data Connector Name *		
	Sample MySQL Data Connector		
2	Description		
	3 User Name *		
	*Use Read only credential		
	4 Password *		
	5 IP/Host *		
	10.00.0		
	6 Port *		
	-		
	7 Database Name		
	Sample Database		
		Cancel	Save

xi) A success message appears to confirm the connection (only for the database connectors).



- xii) Another success message appears to inform the user that the data connector has been created successfully.
- xiii) The newly created data connector gets added to the data connector list.

≡	Data Center		DataConnector created							New
7	Home	Data Connector Type	successfully!							
	Data Connectors	All	•							
	Data Sets	Search Data Connectors						Shov	ving 52 (out of 52
0	Data Stores	Sample MySQL Data Co	onnector				C	<	/	•
e	Data Store Meta Data	restdbautomationMysq	اډ	1	0	æ	C	<	/	ĩ
ŝ	Data Sheets	MySQLDataSheet		 		۵	C	<		Î

6.1.2. Supported Data Connectors

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

6.1.2.1. MySQL

Provide the following information to create a MySQL Data Connector.



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

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

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

viii) A success message appears confirming the connection.



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

🗮 Data Center		DataConnector created							New
Home	Data Connector Type	successfully!							
Data Connectors	All	•							
Data Sets	Search Data Connectors						Shov	ving 52 (out of 52
😑 Data Stores	Sample MySQL Data Co	nnector		-	þ	G	<	-	Î
🧙 Data Store Meta Data	restdbautomationMysq	ļ.	• ••	0	þ	G	<	/	Î
Data Sheets	MySQLDataSheet			0	۵	С	<	1	Î

Note: The user can use the following Environment Variables instead of the actual Username and Password to create the MySQL Data Connectors.



Username: @ENV.MYSQLUSERNAME Password: @ENV.MYSQLPASSWORD

6.1.2.2. MSSQL

Provide the following information to create an MSSQL Data Connector.

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

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

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

ix) A success message appears to confirm the connection.



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



😑 Data Center		DataConnector created successfully!						New
Home	Data Connector Type							
Data Connectors	All	•						
Data Sets	Search Data Connectors					Show	ving 52	out of 52
💩 Data Stores	Sample MSSQL Data Connec	ctor		۵	С	<	/	Î
ata Store Meta Data	restdbautomationMysql		8	۵	C	<	1	Î
🚉 Data Sheets	MySQLDataSheet		8	þ	C	<	1	Î

Note: The user can use the following Environment Variables instead of the actual Username and Password to create the MSSQL Data Connectors.

Username: @ENV.MSSQLUSERNAME Password: @ENV.MSSQLPASSWORD

6.1.2.3. Oracle

Provide the following information to create an Oracle Data Connector.

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

Or	racle Data Connector
C	Data Connector Name *
	Sample Oracle Data Connector
1	Description

- iii) Username: Enter a Username (It should be the same as given in the connection server).
- iv) **Password:** Enter the Password (It should be the same as provided in the connection server).
- v) **IP/Host**: Enter database server details (from where the user wants to fetch data).
- vi) **Port**: Provide the server port number.
- vii) SID Service Name: Provide the unique alias used for the database (when connecting).
- viii) Click the 'Save' option.

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



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

Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Connectors				Shov	wing 52 d	out o
👜 Data Stores	Sample Oracle Data Connector	= 📀	۵	C	<	/	Î
💼 🛛 Data Store Meta Data	restdbautomationMysql	= 😔	۵	c	<	1	Î
Data Sheets	MySQLDataSheet	=	۵	с	<	1	Î

Note: Note: The user can use the following Environment Variables instead of the actual Username and Password to create the Oracle Data Connectors. Username: ENV.ORACLEUSERNAME Password: ENV.ORACLEPASSWORD

6.1.2.4. Hive

Provide the following information to create a Hive Data Connector.

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

Η	ive Data Connector
	Data Connector Name *
	Sample Hive Data Connector
	Description

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

User Name *	
Password *	
P/Host *	
Port *	

Save

Cancel



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

6.1.2.5. SAP Hana

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

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

SAP Hana Data Connector	
Data Connector Name *	
Sample SAP Hana Data Connector	
Description	

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

User Name *		
bizviz		
Password *		
P/Host *		
192.168.1.54		
Port *		
3308		
	Cancel	Save

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

6.1.2.6. MSSQL OLAP Data Connector

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

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



MsOlap Data Connector

Data Connector Name *

Sample MsOlap Data Connector

Description

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

User Name *	
Password *	
Address Type IP O Host	
Ip *	
Port	
Database Name *	
	Cancel Save

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

6.1.2.7. Data Store

Provide the following information to create a Data Store Data Connector.

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



lastic SQL Data Connector	
Data Connector Name *	
Sample Data Store Data Connector	
Data Store Service *	
Sample Data Store 🔻	
	Cancel Save

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

	Data Center		DataConnector created						New
7	Home	Data Connector Type	successfully!						
	Data Connectors	All	•						
	Data Sets	Search Data Connectors				SI	howing	2086 out	t of 2086
0	Data Stores	Sample Data Store Data	Connector	0	۵	С	<	1	ĩ
e	Data Store Meta Data	BizViz_Automation_WT			۵	C	<	1	Î
\$	Data Sheets	ewesfsd		•	۵	C	<	1	Î

6.1.2.8. Cassandra Native Data Connector

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

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

Cassandra Native Data Connector
Data Connector Name *
Sample Cassandra Native Data Connector
Description

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



User Name *	
Password *	
IP/Host *	
Multiple comma separated hosts can be given Port •	
Default Keyspace Name	
Consistency Level	Cancel Save

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

6.1.2.9. OData

Provide the following information to create an OData Data Connector.

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

OData Data Connector	
Data Connector Name *	
Sample OData Data Connector	

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



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

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

6.1.2.10. Spark SQL Data Connector

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

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

Spa	ark SQL Data Connector
Da	ta Connector Name *
Sa	ample Spark SQL Data Connector
	escription

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

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

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



6.1.2.11. AWS Redshift

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

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

/	AWS Redshift Data Connector	
	Data Connector Name *	
	Sample AWS Redshift Data Connector	
	Description	

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

User Name *		
bizviz_user		
*Use Read only credential		
Password *		
IP/Host *		
and the second of the second sec		
Port *		
Database Name *		
	Cancel	Save

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

6.1.2.12. File

Provide the following information to create a File Data Connector.

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



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

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

🗮 Data Center		DataConnector created successfully	1					New
🚮 Home	Data Connector Type							
Data Connectors	All	•						
Data Sets	Search Data Connectors					Shov	ving 52 d	out of 52
😝 Data Stores	Sample File Data Connect	tor		۵	C	<	1	Î
	restdbautomationMysql			 þ	C	<	/	Î
Data Sheets	MySQLDataSheet			 ۵	C	<	1	Î

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

6.1.2.13. Amazon

Provide the following information to create an Amazon Data Connector.

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

-	://mws.amazonservices.in
	ann agus agus an
	oken *

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

Account Verified Successfully

vi) The Amazon Marketplace connector page reopens with the 'ACCOUNT VERIFIED' notification.



- vii) Provide a title for the Data Connector.
- viii) Click the 'Save' option.

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

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

🗮 Data Center		Data Connector added successfully!						New
Home	Data Connector Type	Data Connector added successiony:						
Data Connectors	All	•						
Data Sets	Search Data Connectors					Sho	owing 2	out of 2
😝 Data Stores	Sample Amazon Marketpla	ace Data Connector		þ	C	<	1	Î
🤮 Data Store Meta Data	Sample MySQL Data Conn	ector	-	۵	c	<	/	Î
Data Sheets								

6.1.2.14. App Store

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

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

A	pp Store Connector
	Data Connector Name * Sample App Store Data Connecto
	Description

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



Email ID *		
bizviz@apple.com		
Key ID *		
IssuerID •		
issuer iu *		
Private Key *		
and a contract of the second		
	Cancel Save	

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

📃 Data Center								New
😚 Home	Data Connector Type							
Data Connectors	All							
📇 Data Sets	Search Data Connectors					Sh	owing 2	out of 2
🔷 Data Stores	Sample App Store Data Connector	0 · · · ·	٥	¢	C	<	/	ĩ
🚓 🛛 Data Store Meta Data	Sample MySQL Data Connector		•	۵	C	<	1	Î
Data Sheets								

6.1.2.15. Bing Ads

Provide the following information to create a Bing Ads Data Connector.i) Log in to a Bing Ads account by clicking on the 'SELECT ACCOUNT' option.

Bing Ads Connector	
Login to Bing Ads account	
Select Account	

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

to



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

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

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

6.1.2.16. Dropbox

Provide the following information to create a Dropbox Data Connector.

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

Dropbox Connector	
Login to Dropbox account	
Select Account	

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

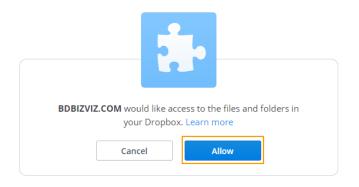
**

	.	
Sign in to D	ropbox to link with E	BDBIZVIZ.COM
G	Sign in with Google	
	or	
Email		
Password		

New to Dropbox? Create an account



- iv) A message appears asking to allow the selected Dropbox account access to BDB.
- v) Click the 'Allow' option to provide access to the selected Dropbox account.



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

ropbox Connecto	r			
Login to Dropbox account				
Change Account				
Data Connector Name *				
Sample Dropbox Data Conr	ector			
Description				
			Cancel	Save

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

🚍 Data Center		Data Connector added successfully!						New
🔂 Home	Data Connector Type							
Data Connectors	All	-						
Data Sets	Search Data Connectors					Sh	owing 2	out of 2
😑 Data Stores	Sample Dropbox Data Co	onnector	•	b	С	<	1	Ē
🧙 🛛 Data Store Meta Data	Sample MySQL Data Con	nnector		۵	С	<	/	Î
🚉 Data Sheets								

6.1.2.17. FTP Server

Provide the following information to create an FTP Data Connector.



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

F	TP Server Data Connector
	Data Connector Name *
L	Sample FTP Server Data Connector
l	Description

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

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

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

6.1.2.18. Facebook

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

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

Facebook Connector	
Select Account Add New Account	
Data Connector Name *	

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



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

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

() 508	
Continue as	?
Bizviz will receive your name let Bizviz post to Facebook wi	and profile picture. This doesn't thout your permission.
Cancel	Continue as
Not ? Log	into another account.

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

(f) 🗆 536	*
	A
You've now linked Bizviz to	Facebook
You can update what Bizviz can d	o in your
Business Integrations Settings. To require additional steps.	finish setup, Bizviz may
	•
ок	
	Link Cont
Bizviz's Privacy Policy	Help Center



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

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

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

📃 Data Center									New
🔂 Home	Data Connector Type	Data Connector added successfully!							
Data Connectors	All	~							
Data Sets	Search Data Connectors						Sho	owing 2	out of 2
😑 🛛 Data Stores	Sample Facebook Data Co	onnector	• ••	0	۵	C	<	/	Î
🚓 🛛 Data Store Meta Data	Sample MySQL Data Conr	nector		0	۵	C	<	/	Î
🙀 Data Sheets									

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

acebook Connector		
NO_EMAIL		E
aata Connector Name * Sample Facebook Data Connector		
Description		
		d Cour
	Canc	el Save



6.1.2.19. Facebook Ads

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

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

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

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

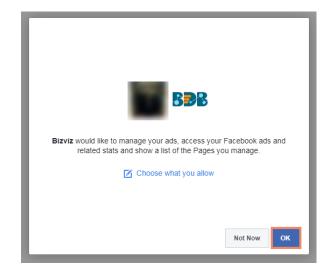
facebook sign up	
	Log in to Facebook
	Email address or phone number
	Password
	Log in
	Forgotten account? - Sign up for Facebook Not now

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

() 🗆 598			
Continue as			
Bizviz will receive let Bizviz post to	e your name Facebook wi	and profile picture thout your permis	e. This doesn't sion.
Cance	əl	Continue as	
Not	? Log	into another acco	ount.
Bizviz's Privacy Policy			Help Center



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



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

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

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

							New
🔂 Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Connectors				Sho	owing 2	out of 2
👌 Data Stores	Sample Facebook Ads Data Connector	•	۵	C	<	/	
😪 🛛 Data Store Meta Data	Sample MySQL Data Connector	0	٩	C	<	1	Î
Data Sheets							



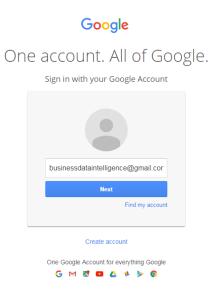
6.1.2.20. Firebase DB

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

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

FireBase DB Connector	
Login to FireBase DB account	
Select Account	

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



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

Google			businessdataintelligence@gmail.com 🕶
	- BIZVIZ wou	uld like to:	
	8 Have offline access	0	
		Deny Allow	

vi) The Firebase Data Connector page opens with a notification that the users is successfully logged in to the selected account

a. Provide the Data Connector name.

- b. Describe the Data connection (optional).
- c. Click the **'Save'** option.



ireBase DB Connector		
You are Logged in!		
Change Account		
Data Connector Name *		
Description		
Description		
	Cancel Save	

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

🗮 Data Center		Data Connector added successfully!							New
🔂 Home	Data Connector Type	Data connector acced successiony:							
Data Connectors	All	•							
Data Sets	Search Data Connectors						Sh	owing 2	out of 2
📀 🛛 Data Stores	Sample FireBase Data Con	nector		•	¢	C	<	/	
Data Store Meta Data	Sample MySQL Data Conn	ector	• ••	•	۵	G	<	1	Î
Data Sheets									

6.1.2.21. Fitbit

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

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

FITBIT Connector	
Login to FitBit account	
Select Account	

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

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



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

ireBase DB Connecto		
You are Logged in! Change Account		
Data Connector Name * Sample FireBase Data Connector		
	Cancel	Save

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

Home	Data Connector Type	Data Connector added successfully!						
Data Connectors	All	•						
Data Sets	Search Data Connectors					Sho	owing 2	out of
Data Stores	Sample Fitbit Data Connec	tor	 •	b	C	<	1	Î
Data Store Meta Data	Sample MySQL Data Conn	ector	٢	(de)	C	<	/	Î

6.1.2.22. Flipkart

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

Flipkart Connector	
Login to Flipkart account	
Select Account	



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

okart Permission Registration	
	Please sign in
	Email address
	Password
	Sign in

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

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

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

6.1.2.23. Google AdWords

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

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

Google Adwords Connector	
Login to Google Adwords account	
Select Account	



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



One account. All of Google.

Sign in with your Google Account

Email or phone	
Next	
Find my account	
Create account	

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

	Google
On	e account. All of Google
	Sign in with your Google Account
	< Contraction of the second se
	crictix.analytics@gmail.com
	Sign in
	Stay signed in Forgot password?
	Sign in with a different account
	One Google account for everything Google G M 🐹 💶 🛆 🄃 🖗

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



Google			crictix.analytics@gmail.com 👻
	BD Biz∨iz would lik	te to:	
	8 Have offline access	(j)	
		Deny Allow	

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

Google Adwords Connector	
You are Logged in!	
Change Account Data Connector Name •	
Sample Google AdWords Data Connector	
Description	
	Cancel Save

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

6.1.2.24. Google Analytics

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

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

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

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



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

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

Google		bu	sinessdataintelligence@gmail.com 👻
	- BIZVIZ wo	ould like to:	
	8 Have offline access	0	
		Deny Allow	

- iv) The user gets redirected to the data connector form with an authorization code in the URL, after getting the access permission. The form mentions that the user has been logged in to the selected Google account.
- v) Data Connector Name: Enter a user-defined name to identify the data connector.
- vi) **Description:** Describe the data connector (optional).
- vii) Click the 'Save' option.

← -		ar/data-center.html#/connector/googleanalytics/create code=4%2FtwHovn6vRvhFh_DNoRAtg8a7F45Q68esOU187uthxLoEDNZcUnvpSnC4a8F_PsRkKoj Q eccion Plat	\$	₽ :
B	Data Center	Q 🏢 🛱	(?) Ne	W
6	Home	Google Analytics Connector		
	Data Connectors	You are Logged in!!		
• •	Data Sets	Data Connector Name +		
6	Data Stores	Sample Google Analytics Data Connector		
e	Data Store Meta Data			
		Cancel Sav	2	

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



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

Data Center		Data Caracter added averagefullet						New
Home	Data Connector Type	Data Connector added successfully!						
Data Connectors	All	•						
🛗 Data Sets	Search Data Connectors					She	owing 2	out of 2
👌 Data Stores	Sample Google Analytic	s Data Connector	 0	<u>ل</u> ه	c	<	/	Î
🧙 Data Store Meta Data	Sample MySQL Data Co	nnector	0	۵	c	<	1	
Data Sheets								

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

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

6.1.2.25. Google Big Query

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

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

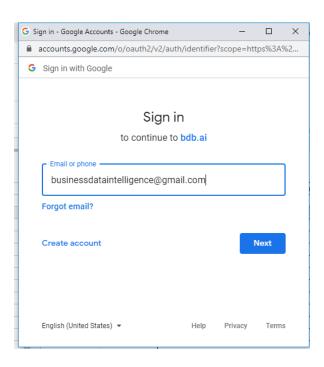
			Q	III 🕂 🖓 🗛
				New
fitbit	7	٨	~	
Fitbit	Flipkart	Google Adwords	Google Analytics	Google Big Query

- ii) The 'Google Big Query Connector' page opens.
- iii) Select the 'Add New Account' option to add a new Google account or select an added Google account from the Select Account drop-down menu.



businessdataintellige	ence@gmail.com	
Add New Account	1	

- iv) The user gets redirected to select a Google account.
- v) Provide valid credentials to select a Google Account.



- vi) A new page opens, asking the user to share the information from the selected Google account with BDB.
- vii) Click the 'Allow' option.

Google		bu	sinessdataintelligence@gmail.com 👻
	- BIZVIZ wo	uld like to:	
	8 Have offline access	()	
		Deny Allow	

- viii) The Google Forms Connector page opens again with the selected Google account.
- ix) Provide a name for the Google Big Query Connector.
- x) Click the 'Save' option.



ogle Big Query Connector	
usinessdataintelligence@gmail.com	
ata Connector Name *	
Sample Google Big Query Connector	
Description	
	Cancel Save

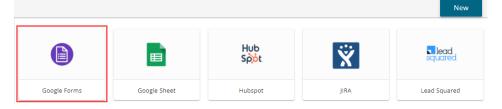
xi) A success message appears to confirm the creation of the Google Form Connector. The newly created Google Form Connector gets added to the Data Connectors list.

B B•					Q		4 <mark>.</mark>	0
Data Center		Data Connector has been added						New
🚮 Home	Data Connector Type	successfully						
Data Connectors	All	-						
Data Sets	Search Data Connectors					Showin	ng 864 o	ut of 864
Data Stores	Sample Google Big Query	Connector	•	þ	C	<	1	ī
😜 🛛 Data Store Meta Data	accntnt_cost		•	۵	C	<	1	Ĩ
Data Sheets	hr_cost			(ab)	C	<	1	Î

6.1.2.26. Google Forms

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

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



- ii) The 'Google Form Connector' page opens.
- iii) Click the 'Select Account' option from the Google Form Connector page.

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



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

Google		i@gmail.com ◄
	BIZVIZ would like to:	
	See, edit, create, and delete all of your Google Drive ()	
	View metadata for files in your Google Drive ①	
	See, edit, create, and delete your spreadsheets in Google Drive	
	By clicking Allow, you allow this app and Google to use your information in accordance with their respective terms of service and privacy policies. You can change this and other Account Permissions at any time.	
	Deny Allow	

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

Google Form Connector		
You are Logged in! Data Connector Name = Sample Google Form Data Connector	Change Account	
Description		
		Cancel Save

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

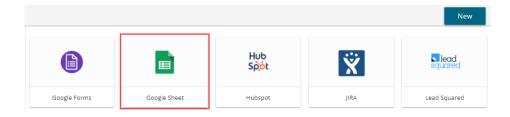
🗮 Data Center		Data Connector added successfully!						New
Home	Data Connector Type							
Data Connectors	All	•						
🚆 Data Sets	Search Data Connectors					Sho	owing 2	out of 2
碞 Data Stores	Sample Google Form Dat	a Connector	 •	<u>i</u>	C	<	1	Î
🧙 🛛 Data Store Meta Data	Sample MySQL Data Con	nector	 0	۵	С	<	/	Î
🚉 Data Sheets								



6.1.2.27. Google Sheet

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

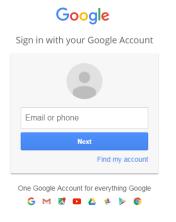
i) Click on the 'Google Sheet' connector type from the Data Connector page.



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

Google Sheet (Connector	
Login to Google Shee	et account	
Select Account		

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



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



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

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

Google Sheet Conne	ctor		
You are Logged in!			
Change Account			
Sample Google Sheet Data Co	nnector		
Description			
			Cancel Save

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

📃 Data Center		Data Connector added successfully!						New
🔂 Home	Data Connector Type							
Data Connectors	All	•						
Data Sets	Search Data Connectors					Sh	owing 3	out of 3
🖕 Data Stores	Sample Google Sheet [Data Connector	 •	۵	C	<	1	Î
🤤 Data Store Meta Data	Sample Google Form D	ata Connector	 •	۵	C	<	1	Î
Data Sheets	Sample MySQL Data Co	onnector	 •	۵	C	<	1	Î

6.1.2.28. HubSpot

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

i) Click the 'HubSpot' Data Connector icon from the Data Connector page.



		Hub Sộắt	Ϋ́	squared
Google Forms	Google Sheet	Hubspot	JIRA	Lead Squared

- ii) The HubSpot Data Connector page opens.
- iii) The user needs to login to a Hub Spot account by clicking on the 'Select Account' option.

HubSpot Connect	tor
Login to Hub Spot accour	at .
Select Account	

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

HubSpot	
Don't have an account? Sign up	
Email address	
1	
Password	Show Password
Forgot my password	
Remember me	
Log in	
G Sign in with Google	
Log in with SSO	

v) Choose a Google Account from the listed accounts.

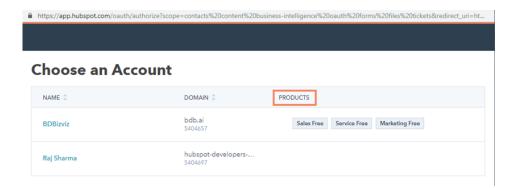


	Choose an accoun	it
C	Crictix Analytics crictix.analytics@gmail.com	Signed out
3 D)	BDI Systems businessdataintelligence@gmail.com	Signed out
0	Use another account	

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

G Sign in with Google		
Hi E 🔬 businessdatainte		
Enter your password	Ø	
Forgot password?	Next	
glish (United States) 👻	Help Privacy	Tern

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





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

ubSpot Connector		
You are Logged in!		
Change Account		
Data Connector Name *		
Sample HubSpot Data Connector	 	
Description		
		ncel Save

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

📃 Data Center		Data Connector added successful	b.d						New
🚮 Home	Data Connector Type		iy:						
Data Connectors	All	-							
Data Sets	Search Data Connectors						Sho	owing 3	out of 3
😝 Data Stores	Sample HubSpot Data C	Connector	• ••		<u>b</u>	G	<	1	Î
Store Meta Data Store Meta Data	Sample Google Form Da	ata Connector	•••	•	è	G	<	/	Î
🚉 Data Sheets	Sample MySQL Data Co	onnector		0	۱.	G	<	1	Î

6.1.2.29. JIRA

Provide the following information to create a JIRA Data Connector.

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

				New
		Hub Spot	×	squared
Google Forms	Google Sheet	Hubspot	JIRA	Lead Squared

- ii) The 'JIRA Data Connector' page opens.
- iii) Data Connector Name: Provide a user-defined name to identify the data connector.
- iv) Description: Describe the data connection.
- v) Username: Enter a Username (It should be the same as given in the connection server).



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

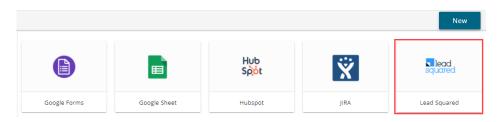
IIRA Data Connector	
Data Connector Name *	
Sample JIRA Data Connector	
Description	
User Name *	
API Tokan +	
	2
Server URL (Example: https://your-domain.atlassian.net) *	•
	Cancel Save

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

6.1.2.30. Lead Squared

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

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



- ii) The Lead Squared Data Connector page opens.
- iii) Provide the following information:
 - a. Data Connector name
 - b. Description
 - c. Access Key
 - d. Secret Key
 - e. Region Type
 - f. Database Name
- iv) Click the 'Save' option.



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

v) A message appears to assure successful authentication.



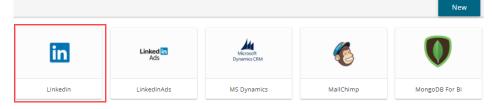
vi) Another success message appears, and the newly created Leadsquared data connector gets added to the Data Connectors list.

😑 Data Center	Data Connector added successful	vi						New
Home	Data Connector Type	<i>.</i>						
Data Connectors	All							
🚆 Data Sets	Search Data Connectors					Sh	owing 3	out of 3
💩 Data Stores	Sample LeadSquared Data Connector	• •• •	0	þ	C	<	/	Î
🧙 Data Store Meta Data	Sample Google Form Data Connector	• • • •	-	þ	C	<	1	i i
🚉 Data Sheets	Sample MySQL Data Connector			þ	C	<	1	

6.1.2.31. LinkedIn

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

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



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



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

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

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

inkedin Connector				
You are Logged in!				
Change Account				
Sample Linkedin Data Connecto	or			
Description				
			Cancel	Save

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

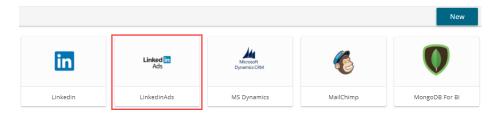
Data Center	Data Connector added successfully!							New
Home	Data Connector Type							
Data Connectors	All							
Data Sets	Search Data Connectors					Sh	owing 3	out of 3
💩 Data Stores	Sample LinkedIn Data Connector	• ••	٥	b	c	<	1	Î
Data Store Meta Data	Sample Google Form Data Connector	• • •	٠	۵	C	<	1	Î
Data Sheets	Sample MySQL Data Connector	0 		þ	C	<	1	Î



6.1.2.32. LinkedIn Ads

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

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



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

LinkedIn Ads Connector	
Add New Account	
Had Hell Hecoarte	

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

Linked <mark>in</mark>		Sign in	Join now
	Linked	in "	
	Email address or phone	e number	
	Password		
	Cancel	Sign In	
	Forgot password?	Join nov	v
Link	ced in © 2018 User Agreem	ent Privac	y Policy Comm

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



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

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

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

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

😑 Data Center	Data Connector added successfully!							New
Home	Data Connector Type							
Data Connectors	All							
Data Sets	Search Data Connectors					Show	ving 52	out of 52
💩 Data Stores	Sample LinkedIn Ads Data Connector		# 4	b	C	<	/	
😪 Data Store Meta Data	restdbautomationMysql	8	#		c	<	1	Î
Data Sheets	MySQLDataSheet	8	8		c	<	1	Î

6.1.2.33. MS Dynamics

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

i) Click the 'Microsoft Dynamics' Data Connector icon from the Data Connector page.



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

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

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

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

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



6.1.2.34. MailChimp

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

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

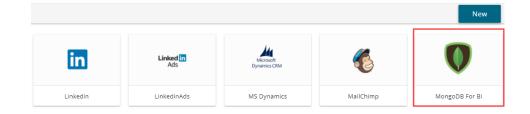
?

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

📃 Data Center	Data Connector added success	fullv!						New
🔂 Home	Data Connector Type							
Data Connectors	All							
Data Sets	Search Data Connectors					Show	ving 52 (out of 52
💩 Data Stores	Sample MailChimp Data Connector	0 0	٠	b	c	<	1	•
Pata Store Meta Data Data	restdbautomationMysql	8 - 1 - 1 6 - 1 - 1	٠	۵	C	<	1	
Data Sheets	MySQLDataSheet	8 0	•	٩	C	<	1	

6.1.2.35. Mongo DB for BI

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



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



MongoDB Conne	ector For Bl
Data Connector Name *	
Sample MongoDB Conr	nector for BI
Description	

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

User Name *	
bizviz	
*Use Read only credential Password *	
IP/Host *	
Port *	
Database Name	
the second s	
	Cancel Save

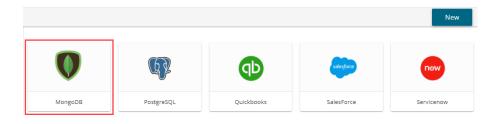
vi) A success message appears, and the newly created Mongo DB Connector gets added to the Data Connectors list.

🗮 Data Center							New
🚮 Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Connectors				Show	ving 52	out of 52
😝 Data Stores	Sample MongoDB Data Connector	•	۵	C	<	/	Î
😪 Data Store Meta Data	restdbautomationMysql	•	¢	C	<	1	Î
🙀 Data Sheets	MySQLDataSheet	0	(disp	C	<	1	Î

6.1.2.36. Mongo DB

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

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





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

Ν	AongoDB Connector
	Data Connector Name *
	Description *

- iv) Provide the following information:
 - a. Connector Type: Select an option out of Standard or SRV
 - b. Username
 - c. Password
 - d. IP/Host address
 - e. Port number
 - f. Database Name
- v) Click the 'Save' icon.

Connection Type *		
Standard		*
User Name *		
bi_user		
*Use Read only credential		
Password *		
IP/Host *		
Port *		
Database Name		
	Cancel	Save

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

BBB®					Q		4 ²⁵	?	W
😑 Data Center	DataConnector created							Nev	,
Home	Data Connector Type	successiully!							
Data Connectors	All								
Data Sets	Search Data Connectors					Showir	ng 932 o	ut of 93	2
💩 Data Stores	Sample MongoDB Connector		•	b	c	<	1	Î	
Data Store Meta Data	testTwitter		0	¢	G	<	1	Î	
Data Sheets	esConn			<u>a</u>	е	<	1	Î	

6.1.2.37. Postgre SQL

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

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



- ii) The PostgreSQL Data Connector page opens.
- iii) Provide a name for the data connector.
- iv) Describe the data connection.

ostgreSQL Data C			
Data Connector Name *			
Sample PostgreSQL Data Connector			
Description			
ovide the following inform	mation:		
ovide the following inform	nation:		
ovide the following inforr Username	nation:		

- c. IP/Host
- d. Port

v)

- e. Database Name
- vi) Click the 'Save' option.

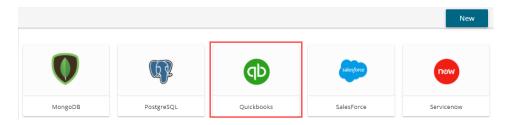
User Name *		
automation_user		
Password *		
IP/Host *		
Port		
Database Name		
	Cancel	Save

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

6.1.2.38. QuickBooks

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

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



- ii) The QuickBooks Connector page opens.
- iii) Click the 'Select Account' option for login to a QuickBooks account.



Qı	uickBooks Connector	
	Login to QuickBooks account	
	Select Account	

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

of duickbooks.	
Don't have an account? Sign up now. Sign in	
G Sign in with Google]
er e	
Password	
Remember me	
🔒 Sign In	
I forgot my user ID or password	
Intuit. simplify the business of life	

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

စာ ဗိုယ်ငkbooks.
Don't have an account? Sign up now.
Let's make sure it's you
We'll send you a code to verify your info. This helps keep your account safe. Learn more
Choose one option:
Get a code texted to: ********2563
◎ Get a code emailed to: v*****r®bdbizviz.com
Confirm my account a different way (takes longer)
Cancel
Intuit. simplify the
Sturbotax の quickbooks の proconnect の init

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

vii) After verifying the authenticity code, the user gets a new window asking to authorize BDBizViz.



viii) Click the 'Connect' option.

n guickbooks.	Welcome, Vivek (Not you?)
Authorize Intuit to securely share your data to BDBizViz_1	
quickbooks.	2
Big Data BizViz LLC BDBi:	zViz_1
 When you select Connect we will grant BDBizViz_1 access to your QuickBooks Online of data about your company, data about your customers, suppliers, and/or employees, any updates you may make to your QuickBooks Online data after you connect. 	data. This includes:
You can find a list of data here.	
Intuit and BDBizViz_1 may share the information in my Intuit and BDBizViz_1 accounts. BDBizViz_1 and its use of your information are subject to BDBizViz_1's Terms of Service learn more about how Intuit uses your data, see our Privacy Statement.	
Disconnect BDBizViz_1 anytime from your My Apps page.	
Cancel	Connect

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

uickBooks Conne				
You are Logged in!!				
Change Account				
Data Connector Name * Sample QuickBooks Data Connec	ctor			
Description				
			Cancel Sav	e

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

6.1.2.39. Salesforce

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

i) Select the 'Salesforce' icon from the Data Connector page.



MongoDB	PostgreSQL	Quickbooks	SalesForce	Servicenow
	Ø	d p	spiesforce	Now
				New

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

Sales Force Connector	
Salesforce	
SandBox	
Select Account	

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

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

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



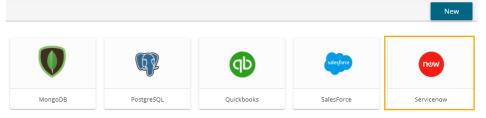
	Cancel Save

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

6.1.2.40. ServiceNow

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

i) Select the 'ServiceNow' icon from the Data Connector page.



- ii) The Service Now Connector form opens.
- iii) Navigate to the https://developer.servicenow.com/app.do#!/instance link.
- iv) Provide the credentials to login.
- v) A new page appears with the instance link.
- vi) Refresh the instance.
- vii) Copy the instance link and use it in the '**Developer Instance URL**' provided in the Service Now connector form.
- viii) Fill in the following information:
 - 1. Data Connector Name: A user-defined name to identify the data source.
 - 2. Description: Describe the connector details.
 - 3. Instance Username: Enter the Instance username.
 - 4. Password: Enter the password for the selected user.
 - 5. Developer Instance URL: Provide the developer's Instance URL.
- ix) Click the 'Save' option to verify and save the new data connector details.



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

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

6.1.2.41. Snowflake

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

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

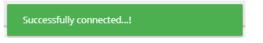
Snowflake Con	nector
Data Connector Name *	
Sample Snowflake Da	ata Connector
Description	

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



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

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



- xii) Another success message appears to inform you that the Data connector has been created successfully.
- xiii) The newly created Snowflake Data Connector gets added to the Data Connectors list.

🗮 Data Center								New
Home	Data Connector Type							
Data Connectors	All							
🧱 Data Sets	Search Data Connectors					Shov	ving 52 (out of 52
🚭 Data Stores	Sample Snowflake Data Connector			۵	G	<	1	Î
😝 Data Store Meta Data	restdbautomationMysql	0 00 0 0 00	٠	<u>B</u> o	C	<	1	i
🚉 Data Sheets	MySQLDataSheet			<u>d</u>	C	<	1	Ĩ

6.1.2.42. Twitter

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

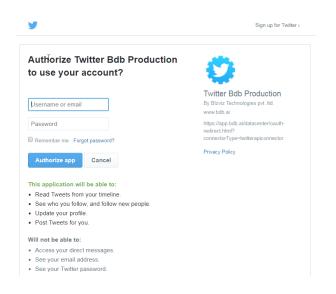
- i) Select the '**Twitter'** connector type icon from the Data Connector page.
- ii) The Twitter Connector page opens.
- iii) Either select a Twitter account listed in the drop-down menu or add a new Twitter account (The steps displayed over here guides the user to add a new Twitter account).

Fwitter Connector	
Select Account	Ŧ
Note: If you are already logged in using one account and want to try using another account then first logout from https://twitter.com	

- iv) An authorization page opens.
- v) Enter the credentials to Sign in.



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



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

Y	598
Authorize Twitter Bdb Production to use your account?	' 💙
Authorize app Cancel	Twitter Bdb Production By Blzviz Technologies pvt. ltd. www.bdb.ai
This application will be able to: • Read Tweets from your timeline. • See who you follow, and follow new people. • Update your profile. Part free for	https://app.bdb.ai/datacenter/oauth- redirect.html? connectorType=twitterapiconnector Privacy Policy
Post Tweets for you. Will not be able to:	
 Access your direct messages. See your email address. See your Twitter password. 	
You can revoke access to any application at any time from the A By authorizing an application you continue to operate under Twitter's Terms of S Twitter. For more, see our Privacy Policy .	

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

vitter Connector				
ou are Logged in!!				
ote:If you are already loggedin using	one account and want to try using	another account then first logo	ut from https://twitter.com	
ta Connector Name * ample Twitter Data Connector				
escription				
			CANC	EL SAVE



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



6.1.2.43. Twitter Ads

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

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

				New
LinkedinAds	MS Dynamics	MailChimp	MongoDB For BI	PostgreSQL
qD	salesforce	Πυω	snowflake	y
Quickbooks	SalesForce	Servicenow	Snowflake	Twitter
THERE AS	yelp	You Tube	Books	
Twitter Ads	Yelp	Youtube	ZOHO Books	

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

vitter Ads Connector		
Select Account		

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



y	Sign up for Twitter >
Authorise Twitter ads Api Conn to use your account?	BBB
Username or email	Twitter ads Api Conn By Bizviz www.bdbizviz.com
Password Remember me Forgotten your password?	http://localhost:8080/datacenter/oauth- redirect.html? connectorType=twitteradsapiconnector
Authorise app Cancel	Privacy Policy
Authorise app Cancel This application will be able to: Read Tweets from your timeline. • Read Tweets from your timeline. Output the second sec	
 See your advertising data including: Campaigns Audiences 	
 Audiences Business and ad account information Ad account and user settings 	

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

Log in to Twitter	
sales@bdb.ai	
Password	
Log in Remember me - Forgot password?	
New to Twitter? Sign up now >>	
Already using Twitter via text message? Activate your account »	

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

witter Ads Connector	
You are Logged in!!	
Note:If you are already loggedIn using one account and want to t Data Connector Name *	ry using another account then first logout from https://twitter.com
Sample Twitter Ads Data Connector	
Description	
	Cancel Save



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

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

6.1.2.44. Yelp

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

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

ata Connector Name *					
ample Yelp Data	Connector				
escription)					
ccess Key *					
				Cancel Test	Cours

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

	AUTHENTICATION Successfull		New
elp Data Connecto	or		
Data Connector Name *			
Sample Yelp Data Connector	r		
Description			
Access Key *			
		Cancel Test	Save

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



Data Connector added successfully!						New
All						
iearch Data Connectors				Showir	ng 622 o	ut of 622
Sample Yelp Data Connector	•	۵	C	<	/	Î
		•	C	<		-

6.1.2.45. YouTube

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

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

YouTube Connector	
Login to You Tube account	
Select Account	

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



Sign in with your Google Account

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

G M 🐮 🚥 🛆 🚸 🕨 🔘

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



Google	d C
Accounts Choose how to use Google:	Select an account
 BDI Systems (businessdataintelligence@gmail.com) BDBIZVIZ Technologies (Big Data BizViz) bit is descended. 	BDI Systems businessdataintelligence@gmail
nividhondemand	BDBIZVIZ Technologies (Big D
	nividhondemand >

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

Google			nividhondemand 👻
	BIZVIZ would	like to:	
	8 Have offline access	0	
		Deny Allow	

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

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

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

Data	Connector added successfully!							New
Data Connector Type								
All	•							
Search Data Connectors						Showin	ig 623 o	ut of 623
Sample YouTube Data Connecto	or	•••	٢	<u>ه</u>	c	<	/	Î
Sample Yelp Data Connector			•	(de)	C	<	1	Î

6.1.2.46. ZOHO Books

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

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

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

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

Data Connector adde	d successfully!						New
Data Connector Type							
All							
Search Data Connectors					Showin	ng 624 o	ut of 624
Sample ZOHO Books Data Connector		0	۵	C	<	1	Î
Sample YouTube Data Connector			බේද	C	<	1	Î

6.1.3. Data Connector List

All the created data connectors are listed on the Data Connectors page provided under the Data Center



module. The user can get a list of all the data connectors by clicking on the 'Data Connectors' option provided on the left side of the page.

🗮 Data Center							New
Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Connectors				Showin	ig 624 o	ut of 624
💩 Data Stores	Sample ZOHO Books Data Connector	🚟 💩	b	C	<	/	Î
🏫 🛛 Data Store Meta Data	Sample YouTube Data Connector	::: 🔶	۵	C	<	1	Î
😫 Data Sheets	Sample Yelp Data Connector	::: 😔	<u>م</u>	C	<	1	
	Sample Twitter Ads Data Connector	= 😔	¢	G	<	1	Î
	Sample Twitter Data Connector	: e	B	C	<	1	Î

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

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

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

- i) Navigate to the list of Data Connectors using the Data Center module.
- ii) Select an MYSQL connector from the list.
- iii) Click on the 'New Query Builder' icon.

-	=	Data Center					New
	7	Home	Data Connector Type				
	9	Data Connectors	MySQL				
		Data Sets	Search Data Connectors ipl	Sho	wing	1 out	of 332
	•	Data Stores	IPL 2017 🖀 🗸 🔞 C	<			Î
	a	Data Store Meta Data					
	<mark>8</mark> ×	Data Sheets					

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

		 								 	 						_	-		
Database																				
IPL2017 4	 	 -								 -	 									
	 	 -						i	i i	 	 					i				
Table Q	 	 								 	 					1				
				1			1									1	Ì			
-																				
IPL_2017scorecard	 	 IPL	Previo	us Re	tords			i		 		i i				1				
	 	 =	_	_	1											1				
IPL_Player_Points_Each_Mat	 	 -	F	Ηd	-			1			 					1				
	 6				Ť			i												
IPL_Players_Percentile_Points		 -	_		·												 			
		i i		i.		- j	i.					1	- i	- i	i.	i i				- i
IPL_Previous_Records		1 1 -	1	1		1		1					1		1	1				1
	 	 i		1		- 1-		i				ii				1	1			
IPL_Previous_Records_copy	 	 -								 	 									

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

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

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



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

Data Center			NEW
Database		3 8	i >
IPL2017 T			
Table Q			
IPL_2017scorecard	IPL-Previous Records		
IPL_Player_Points_Each_Matc			
IPL_Players_Percentile_Points			
IPL_Previous_Records			

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

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

IPL_P	Previous_Records 🧪	1				ā ×
FILTER	PREVIEW DATA	FOREIGN KEY REF.				
Output		Aggregate				
	${\sf Period_Yr}_{{\sf long}}$	aggregate function 🔻	select order type 🛛 🔻	sort order 🛛 🔻	where clause 🔻	and/or 🔻
	Venue _{string}	aggregate function 🔻	select order type 🛛 🔻	sort order 🛛 🔻	where clause 🔻	and/or 🔻
	No_Six _{long}	count 💌	select order type 🔹	sort order 🛛 🔻	where clause 🔻	and/or 🔻
,	Maidens _{long}	sum 🔻	select order type 🛛 🔻	sort order 🛛 🔻	where clause 🔻	and/or 🔻
	InningId _{iong}	aggregate function 🔻	select order type 🔻	sort order 🔻	where clause 🔻	and/or 🔻
	$player_dismissal_type_{string}$	aggregate function 🔻	select order type 🛛 🔻	sort order 🛛 🔻	where clause 🔻	and/or 🔻

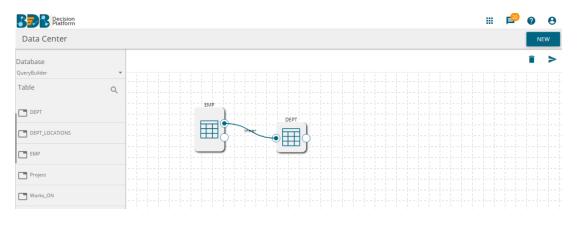
- 2. PREVIEW DATA This tab displays sample data that can be used by the user to decide what type of data is present in the table and accordingly, conditions get created.
- Copyright © 2015-2021 BDB



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

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

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



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

enter EMP 🖌			; ,
FILTER PREVIEW DATA FOREIGN KEY REF.			
Column Name	Reference Column	Reference Table	
Dno	Dno	DEPT	

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



RESULT QUERY		
No_Six		Maidens
0)	0
0)	0
1		0
2	2	0
1		0
0)	0
	< 55 56 57	58 59 60 >>

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

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

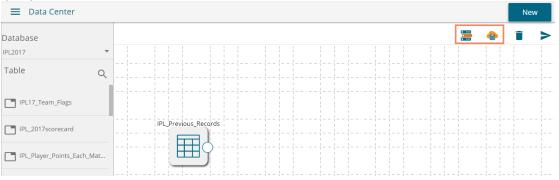
Note:

- a. The Alias Name of the table and the 'Delete' option appear for the selected table while clicking on it.
- b. The user can join the multiple tables by joining the table-nodes. The users can see the possible join conditions in the pop-up window that displays on clicking the node-link.
 E.g., Two different tables 'account_holder' and 'contact' are joined in the following image. By clicking on the connection link, the user gets the option to choose a join condition. Please note that auto-suggestion is provided to help the user with the join condition.

account	holder				contact
0			D		
account_ho	lder	contact			$\begin{array}{cccccccccccccccccccccccccccccccccccc$
item	Operation operator	Item			
CONTACT_ID V	= 🔻	CONTACT_ID 🔻	—	 	
			+		



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



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

0	0	0	0	0	6
Getting Data	Data Type Definition	Hierarchy Definition	Batch Query		Schedule Data Refresh
		Data Connector Name		Detabate Name	
Data Store Name *		Myssql		QBuilder	
Query	ROM QBuilder.Project t0 WHER	RE ((t0.Pno = '')) GROUP BY t0.Pnc	ORDER BY t0.Pno ASC		
	ROM QBuilder.Project t0 WHEF	RE ((t0.Pno = '')) GROUP BY t0.Pnc	ORDER BY t0.Pno ASC		
		RE ((t0.Pno = '')) GROUP BY t0.Pnc	ORDER BY t0. Prio ASC		Ø

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

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

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



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

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

🗮 Data Center															N	lew
Database													2	 0	Î	;
PL2017	*															
Table	Q															
	- 1															
IPL17_Team_Flags																
			IPL Pre	vious_Re	cords											
IPL_2017scorecard																
				TT /	<u>.</u>											
IPL_Player_Points_Each	Mat		- 31	±Π,	Υ.											
			_		1											

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

D	ata Set	
	Service Nam	e *
	Description	
	Data Connector I	lame
	IPL 2017 Database Name	
	IPL2017	
	Query	
	1 SELECT	t0.Maidens,t0.No_Six FROM IPL2017.IPL_Previous_Records t0 LIMIT 1000

6.1.5. Reconnecting a Data Connector

i) Navigate to the Data Connector list.



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

Data Center	3 Successfully reconnected!!							Ne
🔂 Home	Data Connector Type							
Data Connectors	All							
Data Sets	Search Data Connectors				:	Showin	g 624 oi	ut of (
📀 Data Stores	file_connector		•	Ro	c	<		1
Data Store Meta Data	exi	•••	•		c	· <	1	1
Data Sheets	Mssql Test	• •• • ••	٠	2	C	<	1	Î
	dataconnip	* ** * **	٠	ا ھ	Reconnect	<	1	Î
	restdbautomationMysql		•	۵	С	<	1	
	mysql		•	(ab)	C	<	1	

iv) The selected data connector gets reconnected.

6.1.6. Sharing a Data Connector

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

🗮 Data Center								New
Home	Data Connector Type							
Data Connectors	All							
Data Sets	Search Data Connectors					Show	ving 54	out of 54
💩 Data Stores	Hiring Data		0	Þ	2 C	<	/	Î
ata Store Meta Data 😪	Sample MongoDB Data Connector		0	b	G	<	-	Î
Data Sheets	restdbautomationMysql		۲	þ	C	<	1	Î
	MySQLDataSheet		٢	Þ	G	<	1	Î
	Postgress	• • • •	٥	b	C	<	1	Î

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

Share Data Connec	tor	×
4 USER USER GROUP	EXCLUDE USER	
Chetan		
5 RestAutomation RestAutomation	6	
jubilant	6 · 2	
F Vidya krish	<	
Ram	44	
F Nikhil Verma		



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

Share D	ata Connecto	or	×
USER	USER GROUP	EXCLUDE USER	
Chetan RestAutom		7 RestAutomation	
jubilant	ation	>	
Vidya krish		**	
Ram Nikhil Vern	na		
Sanjeev Ne	maji		
		Cancel Sa	ve

ix) Privilege for the selected Data Connector gets updated and the same gets communicated through a message.

9 Data Connector shared privilege has been updated successfully

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

6.1.7. Editing a Data Connector

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

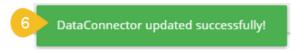
🗮 Data Center							New
Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Connectors				Shov	ving 54 c	out of 54
😝 Data Stores	Hiring Data	0	Þ	G	~	\checkmark	Ē
Data Store Meta Data	Sample MongoDB Data Connector	•	۵	C	<	1	Î
Data Sheets	restdbautomationMysql	0	۵	C	<	1	i

- iii) The Data Connector configuration page opens for the selected data connector.
- iv) Edit or modify the required details (the editable fields may vary as per the type of the data connector).
- v) Click the 'Save' option to save the edited details.



📃 Data Center	New
Home 3	File Data Connector
Data Connectors	Data Connector Name *
🛗 Data Sets 🛛 4	Hiring Data Pescription
😑 Data Stores	It contains a File Data Connector
Data Store Meta Data	
Data Sheets	5
	Cancel Save

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



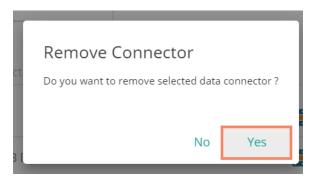
vii) The updated details get saved for the selected data connector.

6.1.8. Removing a Data Connector

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

🗮 Data Center							New
Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Connectors				Shov	ving 54	out of 54
Data Stores	Hiring Data	•) B	C	<	/	
Store Meta Data Store Meta Data	Sample MongoDB Data Connector	0	þ	G	<	/	ĩ
Data Sheets	restdbautomationMysql	•	۵	G	<	1	

- iii) A message will pop-up to confirm the deletion.
- iv) Click the 'Yes' option.



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



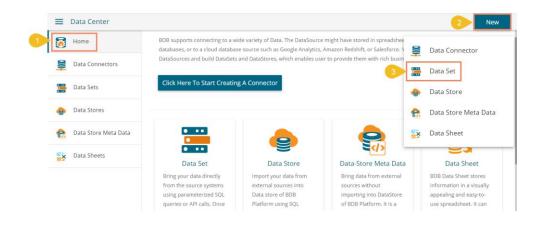
6.2. Data Set

This section includes steps to create a new Data Set based on an RDBMS/Big Data, API, and FTP Data Connectors. The description aims at explaining a set of steps for data set creation based on all the above mention major categories to create a sample data set.

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

This section explains the steps to create a new Data Set.

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



iv) The Data Connectors list gets displayed with the '**Create Data Set**' option for all the available data connectors.

Data Ce	nter		New
Home		Data Source	
Data Co	nnectors	All	
🧮 Data Se	'S	Search Data Connectors	
🚖 🛛 Data Sto	res	Sample MongoDB Data Connector	Create Data Set
😪 🛛 Data Sto	ere Meta Data	restdbautomationMysql	Create Data Set
🙀 Data Sh	eets	MySQLDataSheet	Create Data Set
		Postgress	Create Data Set

- v) Select a Connector Type from the 'Data Source' filter.
- vi) Search and select a data connector from the displayed list of Data Connectors.
- vii) Click the 'Create Data Set' option provided next to the selected data connector.

≡	Data Center	Nev
7	Home	Data Source
9	Data Connectors	MySQL 5
	Data Sets	Search Data Connectors
٠	Data Stores	Claim_data Create Data Se
e	Data Store Meta Data 6	IPL 2017 Create Data Se



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

9 Service Name *	
Sample Data Set	
10 Description	
1 Data Connector Name	
IPL 2017	

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

1 9	ELECT `IPL_Previous_Records`.`Period_Yr` AS `Period_Yr`,		
2	`IPL_Previous_Records`.`Team` AS `Team`,		
3	`IPL_Previous_Records`.`Players` AS `Players`,		
4	`IPL_Previous_Records`.`Runs` AS `Runs`,		
5	`IPL_Previous_Records`.`Balls` AS `Balls`,		
6	`IPL_Previous_Records`.`Wickets` AS `Wickets`,		
7	ifnull(((`IPL_Previous_Records`.`Runs` / `IPL_Previous_Records`.`Balls`) * 100),0) AS `SR`,		
8	if((`IPL_Previous_Records`.`Balls` <> 0),1,0) AS `BatInn`,		
9	if((`IPL_Previous_Records`.`Over` <> 0),1,0) AS `Bowlinn`,		
*Use C	trl+Space for assistance	?	
		9	
			1

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



🗮 Data Center	New
Home	IPL2017
Data Connectors	Query 1 SELECT 'IPL_Previous_Records', 'Period_Yr' AS 'Period_Yr',
Data Sets	2 ¹ PL_Previous_Records ', 'Team' AS 'Team', 3 ¹ PL_Previous_Records ', 'Players' AS 'Players',
e Data Stores	4 'IPL_Previous_Records'."Runs' AS 'Runs', 5 'IPL_Previous_Records'."Balls' AS 'Balls', 6 'IPL_Previous_Records'."Wickets',
Data Store Meta Data	7 ifoull((/)IDL Droviour Percente) (200 Droviour Percente) (2010) (0.000) (5.50)
16 Preview Result	×
Period_Yr Team	Players Runs Balls Wickets SR Batinn Bowlinn ER
2014 Kolkata Knight F	Riders Morne Morkel 0 0 1 0 0 1 4
2014 Kolkata Knight R	Riders Gautam Gambhir 0 8 0 0 1 0 0

xvii) The 'Save' option gets enabled.

`IPL_Previous_Records`.`Team` AS `Team`,
`IPL_Previous_Records`.`Players` AS `Players`,
`IPL_Previous_Records`.`Runs` AS `Runs`,
`IPL_Previous_Records`.`Balls` AS `Balls`,
`IPL_Previous_Records`.`Wickets` AS `Wickets`,
fnull(((`IPL_Previous_Records`.`Runs` / `IPL_Previous_Records`.`Balls`) * 100),0) AS `SR`,
f((`IPL_Previous_Records`.`Balls` <> 0),1,0) AS `BatInn`,
ff(`IPL_Previous_Records`.`Over` <> 0),1,0) AS `Bowlinn`,
Space for assistance 🕜
Validate Save Cance
`∣ `∣ ifi

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

Home	Data	Connector Type	Data Connector	Publi	sh Stati	JS					
Data Connecto	Al		All	▼ All			•				
🚆 Data Sets	Sear	rch Data Sets						5	Showing	3471 ou	t of 343
	1										
Data Stores	18 Sar	mple Dataset		t	Ŧ.	Ŧ	0	1	<	1	
 Data Stores Data Store Me 		mple Dataset	4		ਜ ਜ	± ±	0	-		1	1

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

Option	Name	Task
F	Publish As Data Service	To publish the Data Set as a data service
⊥	Download	To download the Data Set
0	View Link	To display the Data Set link
1	Publish	To publish a Data Set



<	Share Data Service	To share a data set to/for the selected user(s) or group(s) or
		Exclude the selected users
/	Edit	To edit the Data Set fields
1	Remove	To remove the selected data set from the list

6.2.1.1. Applying Dynamic Filter in an RDBMS Data Set

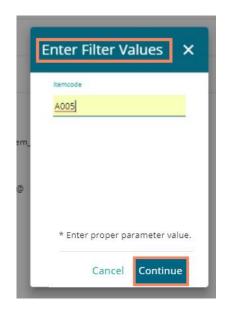
The user can insert dynamic filter condition via the query service to an RDBMS Data Set.

- i) Navigate to the Data Set form for any RDBMS connector.
- ii) Enter the filter condition to the '**Query**' section.
- iii) Click the 'Validate' option.

itemamt as sm from ccddb.bill Where Item_code=@itemcode@ limit 100		select date(tran_date) as dt, item_code , item_name,	
Where item_code=@itemcode@		itemamt as sm	
-		from ccddb.bill	
limit 100	I	Where item_code=@itemcode@	
	ł	limit 100	

G	
Validate	Cancel

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



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

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

viii) Click the 'Save' option to save the Data Set form.



ix) The newly created dataset gets saved with the filter value under the Data Sets list.

Note:

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

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

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

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

🗮 Data Center									New
Home	Data Connector Type	Data Connector	Publish St	atus					
Data Connectors	MySQL -	IPL 2017	Publishe	d	•				
Data Sets	Search Data Sets						Show	ving 40	out of 40
😔 🛛 Data Stores			_		_				
😭 🛛 Data Store Meta Data	dataservice test 🛛 🖪			-	0	1	<	1	
式 Data Sheets	Sample Data Set 🛛 🖪			4	0	1	<	/	
	ipldata 🖪			4	0	1	<	1	

6.2.1.2. Restricting Displayed Data for End Users via Data Set

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

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

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

Admin Module				
tom Field Settings				+ C
Custom Field Inform	nation			^
Кеу	Input type	Description	Mandatory	Delete
doj1	Manual	✓ Please add start date	No	• ×
doj2	Manual	 Please add end date 	No	• ×
date_key	Manual	✓ date_key	Yes	- ×

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

Data Connector Name		
oracle_dec10_UATSanity		
Database Name		
ORCL		
Query		
1 select = from NLPDATA 2 where DATE_KEY* [ENV.DATE_KEY]		
*Use Ctrl+Space for assistance	0	
	Validate	Cancel

- iii) Create a Dashboard using the Data Set.
- iv) Publish the Dashboard to the portal.
- v) Open the Dashboard (it opens in preview mode by default as displayed below).

My Documents	> demo >			
	Yearly sales and expense		К.Я К 31	
	date_key	student_name		
	2018-04-02 09:08:30.026000	Archana		
	2018-04-04 09:11:27.899000	Anagha		
	2018-04-20 09:12:06.110000	Kartik		
	2018-04-03 09:12:51.001000	Oskar		
	2018-04-11 09:13:18.662000	Den		
	2018-04-25 09:13:45.350000	Joey		
	2018-04-30 09:14:17.462000	Ross		

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

	BBBQ
Update User	Cancel Save
ell.	
TE_KEY	
-APR-18 09.12.06.110000000 AM	

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

Properties			×
demo < Properties	Share with User	Share with Group	Exclude >
Search	Q		1/41
BDB bdbuser@bdb.ai			
admins admin@rbl.com			
cluster_two cluster2@rbl.com			
clusters cluster1@rbl.com			
		Close	Save

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

My Documents > der	no 🗲			0
	Yearly sales and expense		кл кл	
	date_key	student_name		
	2018-04-20 09:12:06.110000	Kartik		

Publishing as Data Service 6.2.1.3.

Keil

DATE_KEY 20-APR-

The user can publish a Data Set as a service using the 'Publish As Data Service' option. The 'Publish As Data Service' icon gets provided to every Data Set under the list of data sets.

Select a Data Set from the list of Data Sets. i)



ii) Click the 'Publish As Data Service' icon.

Data Center										Nev
Home	Data Connector Type	Data Connector		Publish Status						
Data Connectors	All 👻	All	•	All	•					
🚍 Data Sets	Search Data Sets						s	howing	3982 ou	t of 398
Data Stores	Sample Data Set			2 🗊	ŧ	o	1	<	1	Î
Data Store Meta Data	qwqw 2				ŧ	Θ	1	<	1	Î
Data Sheets	qwqw				ŧ	o	1	<	1	Î
	project details dec-10				<u>+</u>	o	1	<	1	Î
	qwqw 🖪				±	o	1	<	1	î

- iii) The 'Publish As Data Service' form opens.
- iv) Provide the following information:
 - a. Service Name
 - b. Select a category or create a new Category
 - c. Description
 - d. Parameters
 - e. Limit (Maximum limit allowed is up to 100)
- v) Click the 'Save' option.

		Q		Ļ	0	V
Data Center					Ne	w
Home	Publish As Data Service					
Data Connectors	Service Name *					7
Data Sets	SamplePublishedService					-
Data Stores	Select Category * 4 Description *				*	-
Data Store Meta Data	API Bervice					-
Data Sheets	Param					
	Limit		_			
			Cancer		ave	

vi) A success message notifies the users that the selected data set has been published as a service.

BBB					۹		¢.	0
🔲 Data Center	DataSet has been published as a service							New
Home	Data Connector Type successsfully ish Status							
Data Connectors	Ali • Ali	•						
Data Sets	Search Data Sets				s	howing	3982 ou	t of 3982
Data Stores	Sample Data Set 🛛 🖪	۵	ŧ	ø	4	<	1	•
😭 🛛 Data Store Meta Data	qwqw 2	Ø	±	0	4	<	1	
Data Sheets	dwdw	۵	ŧ	۲	4	<	1	

Note:

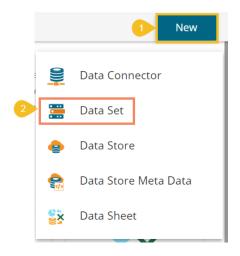
- a. The user can add filter(s) to the data set as a service.
- b. The published data set as service appears on the API Client registration page.
- c. The Data Set published as a data service appears under the drop-down menu of the API Client Registration form.



BBB®				Q	 ¢25	0
Admin Module						
Client List	L	API Client Registration			New	1
Search Client	٩	Client Name *	Client Email *		_	
Vivek Kumar	×	App Name *			_	
Sandeep	× *	Request Per Hour *	Request Per Day *		_	
mongobl_27_5	≅ ∕ ∎	Solut The Sender Entitled #			Т	
mongo_dataservice_27	≥∕∎	market_place_amaya_mysql				
mysql_29	≥ / 1	mongo_bi_serv				
mysql_withfilter	≥ ∕ ∎	mongobi_serv				
mysql_wth_morefilter	■ / ■	mysqLserv			4	
mongobi_noFilter30	8 / 8	SamplePublishedService				
mongoBi_with_filter_30						

6.2.2. Creating a New Data Set Using API Connectors

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



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

	≡ D	ata Center			New
	i	Home	4	hata Source	
3		Data Connectors		Google Analytics	
	 [Data Sets		Search Data Connectors Samp	
	e (Data Stores	5	Sample Google Analytics Data Connector	ate Data Set
	e [Data Store Meta Data			

- vii) The user gets redirected to a new Data Set form for Google Analytics Data Set.
- viii) Fill in the following information:
 - a. Dataset Name: Enter any user-defined name for the new dataset.
 - b. Description: Provide a brief description of the Data Set (It is an optional field).



- c. Data Connector Name: This option comes pre-defined as per the selected data connector.
- d. Account: This option comes pre-defined based on the selected google account.

Data Set
Dataset Name *
Sample Google Analytics Data Set
Description
Data Connector Name
Sample Google Analytics Connector
Account :
bdb.artificialintelligence@gmail.com

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

Web Property *	
BDB.ai UA-123729205-1	
View *	
All Web Site Data	
Dimensions User Type, Count of Sessions, Session Duration, Campaign, Source, Keyword Match Type	

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

Metrics *	-
Users , Bounce Rate , Session Duration , Organic Searches	
Selected Metrics ga:users ga:bounceRate ga:sessionDuration ga:organicSearches	

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

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



9 Apply Filters:	
ga:browser==Firefox;ga:operatingSystem==Windows	?

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

10 Date Type *						
Fixed type						•
	From date *		To date *			
	11/26/2019	•	12/3/2019	•		

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

10 Date Type *		
Dynamic type		Ŧ
Select Date Range *		
30 Days ago		•

h. Click the 'Preview Data' option.

options.



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

						Cancel Preview D	lata Save
Preview of 10 rows ga:userType		ga:daysSinceLastSession	ga:users	ga:newUsers	ga:sessionsPerUser	ga:avgSessionDuration	ga:organicSearches
New Visitor	1	0	28	28	1.0	144.92857142857142	0
Returning Visitor	11	2	1	0	1.0	24.0	0
Returning Visitor	13	24	1	0	1.0	0.0	0
Returning Visitor	2	0	3	0	1.0	7.33333333333333333	0
Returning Visitor	2	11	1	0	1.0	20.0	0
Returning Visitor	2	19	1	0	1.0	0.0	0
Returning Visitor	2	20	1	0	1.0	234.0	0
Returning Visitor	2	23	1	0	1.0	0.0	0

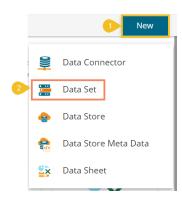
x) A success message appears, and the newly created Google Analytics dataset gets added to the **Data Sets** list.



≡	Data <mark>Center</mark>	13 Datacet created successfully					New
<u></u>	Home	Data Connector Type					
	Data Connectors	All · All	•				
	Data Sets	Search Data Sets		S	howing	3472 ou	t of 3472
	Data Stores	Sample Google Analytics Data Set	٥	4	<	1	
	Data Store Meta Data	restqueryautomation 🔺 🖪 🗜	0	1	<	1	

6.2.3. Creating a New FTP Data Set

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



- iii) The Data Connectors list appears.
- iv) Select an FTP Server using the data source filter.
- v) Select an FTP Data Connector from the list.
- vi) Click the 'Create Data Set' option.

	≡	Data Center		New
	7	Home 4	Data Source	
3	9	Data Connectors	FTPServer •	
		Data Sets	Search Data Connectors	
		Data Stores 5	Sample FTP Server Data Connector 6 Create D)ata Set
	e	Data Store Meta Data	ftpserver28 Create D)ata Set

- vii) A new Data Set creation form opens for the FTP Data Set.
- viii) Provide a name for the Data Set.
- ix) Describe the Data Set (Optional).
- x) The pre-selected Data Connector name appears.
- xi) Click the 'Get All Data' option.



0	Data Set
8	Dataset Name *
	Sample FTP Data Set
9	Description
10	Data Connector Name
	Sample FTP Server Data Connector
	Cancel Get ALL Data

- xii) Select a file from the displayed list (Use double-click on a file to select it.)
- xiii) After selecting a specific file, click the '**Get Sheets**' option.

	Selected File : FL_insurance_2MB.xlsx	
	 1 Test_For_wrong_Data.xisx ALL DATA TEST SEASON 2.xlsx ALL DATA TEST.xlsx DATE TEST 1800.xlsx Data of the year xlsx Data of the year xlsx FL_insurance_2MB.xlsx IRONMAN.xlsx TEST DATA FOR ALL IN ONE.xlsx TestingSpecial.xlsx datecheckfornull.xlsx cmall magin ylay 	
		13 Get Sheets Save
xiv) xv)	Choose a sheet using the drop-down menu. Click the ' Save ' option after getting the data preview.	
		Get Sheets Save
	FL_insurance_sample	15 🔽

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



≡	Data Center	16	D	ataset created successfully!								New
7	Home	Data Connector Type	De	alaset created successibility:		sh Statu	IS					
	Data Connectors	All	•	All	L	All		•				
••••	Data Sets	Search Data Sets							S	howing	3473 ou	t of 3473
•	Data Stores	Sample FTP Data Set				(f)	ŧ	0	1	<	1	
-	Data Store Meta Data	Sample Google Analytics	Data S	Set			Ŧ	0	1	<	1	

6.2.4. Creating a CA PPM Data Set

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

- i) Provide your valid credentials for Login, select the 'CA PPM' as the Auth Type.
- ii) Click the 'Sign In' option.

Sign In

	Decision Platform
	Email *
1	Password *
	Auth Type CA PPM
I	

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





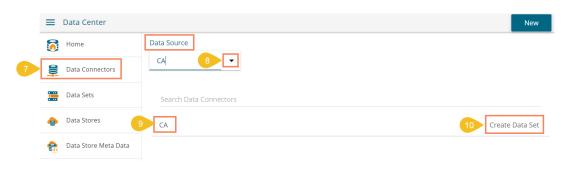
- iv) The Data Center homepage opens.
- v) Click the 'New' option.
- vi) Select the 'Data Set' option from the context menu.

🗮 Data Center				5 New
4 Home	BDB supports connecting to a wi	de variety of Data. The DataSource	might have stored in spreadshee	Data Connector
Data Connectors		e source such as Google Analytics, and DataStores, which enables use	Amazon Redshift, or Salesforce. Y	-
Data Sets	Click Here To Start Creating	g A Connector	•	Data Store
😝 Data Stores			S.	Data Store Meta Data
Data Store Meta Data				Data Sheet
Data Sheets		9	()>	ēX
	Data Set	Data Store	Data-Store Meta Data	Data Sheet
	Bring your data directly from the source systems using parameterized SQL	Import your data from external sources into Data store of BDB	Bring data from external sources without importing into DataStore	BDB Data Sheet stores information in a visually appealing and easy-to-

- vii) The Data Connector list opens.
- viii) Select the default data connector 'CA' from the data connector list. Or

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

- ix) Select a CA data connector.
- x) Click the 'Create Data Set' option for the CA data connector.





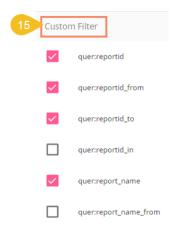
- xi) A form opens to create a new Data Set.
- xii) Provide a Service Name defined by the user to identify the data set.
- xiii) Select a Service URL from the drop-down list.

11 Data Set	
12 Service Name * Sample CA PPM Data Set	
13 Service URL rqrmnt.requirementsByTheme	•

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

14	Mandat	tory Filter
	quer:	_log_date
	quer:	_log_date_from
	quer:	_log_date_to
	quer	_log_date_in
	quer:	_environment
Í	quer:	_environment_from

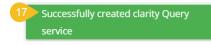
xv) Custom Filter: Select the 'Custom Filter' options using the checkmarks in the boxes.



xvi) Click the 'Save' option.



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





xviii)The newly created Data Set gets added to the Data Sets list.

Data Center									New
Rome	Data Connector Type	Data Connector	Publish Sta	tus					
Data Connectors	All	All	✓ All		•				
Data Sets	Search Data Sets					9	Showing	3498 ou	t of 3498
Data Stores 18	Sample CA PPM Data Set	4	Ð	ŧ	0	1	<	1	
						4	<	1	

Note:

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

	A	в	с	D	E	F	G	н	I	J	к	L	м	N O		Р	Q	R	s	T	
34		1	1.46E+12		1	3.28E+11	152527	0	30174	7 ()	0 1.46E+12	0		0	0	0	2083084 OI	NLINE_	ORDER	
85		1	1.46E+12		1	3.28E+11	152527	0	30174	7 () (0 1.46E+12	0		0	0	0	2083083 OI	NLINE_	ORDER	
6	0	0	1.46E+12		1		140966	0	301748	3 () (0	0		0	0	0	2087304 OI	NLINE_	ORDER	
7	0	0	1.46E+12		1		140966	0	301748	3 () (0	0		0	0	0	2087304 OI	NLINE_	ORDER	
в		1	1.46E+12		1	3.28E+11	130558	0	301749) () (0 1.46E+12	0		0	0	0	2070610 OI	NLINE_	ORDER	
9	0	0	1.46E+12		1		126701	0	301775	i ()	0	0		0	0	0	2098414 OI	NLINE_	ORDER	
)	0	0	1.46E+12		1		126701	0	301775	i ()	0	0		0	0	0	2098414 OI	NLINE_	ORDER	
		1	1.46E+12		1	3.28E+11	126701	0	301775	i ()	0 1.46E+12	0		0	0	0	2098414 OI	NLINE_	ORDER	
		1	1.46E+12		1	3.28E+11	126701	0	301775	i () (0 1.46E+12	0		0	0	0	2098414 OI	NLINE_	ORDER	
		1	1.46E+12		1	3.28E+11	126701	0	301775	5 () (0 1.46E+12	0		0	0	0	2098414 OI	NLINE_	ORDER	
	0	0	1.46E+12		1		140966	0	301748	3 ()	0	0		0	0	0	2087304 OI	NLINE_	ORDER	
		1	1.46E+12		1	3.28E+11	140966	0	301748	3 ()	0 1.46E+12	0		0	0	0	3.28E+11 O	NLINE_	ORDER	
		1	1.46E+12		1	3.28E+11	140966	0	301748	3 ()	0 1.46E+12	0		0	0	0	3.28E+11 OI	NLINE_	ORDER	
		1	1.46E+12		1	3.28E+11	140966	0	301748	3 () (0 1.46E+12	0		0	0	0	3.28E+11 OI	NLINE_	ORDER	
		1	1.46E+12		1	3.28E+11	151364	0	3.28E+1	L ()	0 1.46E+12	0		0	4	0	2081373 O	NLINE_	ORDER	
	0	0	1.46E+12		1		158403	0	301775	i ()	0	0		0	0	0	2089443 OI	NLINE_	ORDER	
	0	0	1.46E+12		1		158403	0	301775	i ()	0	0		0	0	0	2089444 OI	NLINE_	ORDER	
		1	1.46E+12		1	3.28E+11	160693	0	301702	2 ()	0 1.46E+12	0		0	0	0	2084959 OI	NLINE	ORDER	

6.3. Data Store

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

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

6.3.1. Creating a New Data Store

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

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



iv) The Data Connectors list opens.

=	Data Center				2 New
	Home	BDB supports connecting to a wid	e variety of Data. The DataSource	might have stored in spreadshee	Data Connector
	Data Connectors		source such as Google Analytics, A nd DataStores, which enables user	۲ Amazon Redshift, or Salesforce. ۲	
•	Data Sets	Click Here To Start Creating	A Connector	3	Data Store
4	Data Stores				Data Store Meta Data
-	Data Store Meta Data	• • • •			Data Sheet
4 9	🗴 Data Sheets		9		ex
		Data Set	Data Store	Data-Store Meta Data	Data Sheet
		Bring your data directly from the source systems using parameterized SQL	Import your data from external sources into Data store of BDB	Bring data from external sources without importing into DataStore	BDB Data Sheet stores information in a visually appealing and easy-to-

- v) Select a Connector Type from the '**Data Source**' filter (E.g., MySQL data source is selected in the following image).
- vi) Select a data connector from the Data Connector list.
- vii) Click the 'Create Data Store' option provided next to the selected data connector.

	≡	Data Center		New
	7	Home	Data Source	
4	9	Data Connectors	MySQL 5	
		Data Sets	Search Data Connectors Hirring	
	•	Data Stores	Hiring 7 Create Data	Store
		Data Store Meta Data	Prod DB BDB_Hiring Create Data	Store

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

6.3.1.1. Getting Data

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

- i) The user gets the Getting Data tab while clicking the 'Create Data Store' option.
- ii) Enter a name for the Data Store. The Data Connector and Database names display based on the selection of the data connector.
- iii) Write the SQL query in the given space (Use '**Ctrl+Space**' for assistance in writing a query).
- iv) Click the 'Next' option to proceed.



(1	2	3	4	5	6
Getti	ing Data Data	Type Definition	Hierarchy Definition	Batch Query		Schedule Data Refresh
Data St	tore Name *		Data Connector Name		Database Name	
Sam	ple Data Store		Hiring		BDB_Hiring_Data	
23 24 25 26 27 28	cur_monthly_payment a bill_start_date as BillStar	s CurrentMonthlyPayn	hent,			
	Ctrl+Space for assistance					0
						Cancel Ne:

6.3.1.2. Data Type Definition

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

- i) Define the required Dimensions, Measures, and Time by interchanging the categories.
- ii) Enable the Dimensions by using a checkmark to avail LOV lookup in the filter panel of the Self-service BI Report.
- iii) Click the 'Next' option to proceed.

	2	3	4	6	6
tting Data	Data Type Definition	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refres
Dimensions		Measures		Time	
Name	123 (3)	Year	Abc 🕓	ExpectedJoinningDate	Abc 123
Gender	123 🕓	Experience	Abc 🕓	BillStartDate	Abc 123
Source	2 2 123 (3)	PreviousCTC	Abc 🕓		
ReferralOf	123 🕓	OfferedCTC	Abc 🕓		
Designation	123 🕓	ExperiencePerCTC	Abc 🕓		
Team	123 🕓	MonthlySalary	Abc 🕓		
able checkbox for LOV	/ filtering				
revious					Cancer Nex

Note:

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

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

b. Click the 'Previous' option to go back to the previous tab.



c. The user can get a List of Values (LOV) in the filter panel of the BDB Self-service BI for by enabling the Dimensions from the datastore.

6.3.1.3. Hierarchy Definition

Define hierarchy using various dimensions and time options.

- i) Click the 'Add' + option provided on the Hierarchy Definition page.
- ii) A new 'Drill Def' box gets added.
- iii) Drag and drop the dimensions or time options to define a hierarchy.
- iv) Click the 'Next' tab to proceed.

Fields Hierarchy Definition DiviningStatus Anic CurrentStatus Anic ExperienceCategory		1 + ×
Axe joinningStatus Axe CurrentStatus Axe ExperienceCategory 2 Drill Def- 1 Team		×
An CurrentStatus An ExperienceCategory Drill Def- 2		×
Also ExperienceCategory		
Expected/pinningDate:	ExpectedJoinningDate: date	- ×
Axe Comments O Expected/oinningDate Expected/oinningDate: Expected/oinningDate: Expected/oinningDate: month		
() BillStartDate		
Previous		Cancel Next

Note:

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

The user can define the date-drill by dragging once a time dimension into a '**Drill Def**' box. E.g., the Hierarchy for the '**Opening**' time dimension has been defined as shown below:

Drill Def- 2						
ExpectedJoinningDate:	= Exp	ectedJoinningDate: hth	-	ExpectedJoinningDate: date	-	×

d. Each dimension value needs to be dragged and dropped multiple times to create a hierarchy among the dragged values.

6.3.1.4. Batch Query

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

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



			4	5	6
Getting Data	Data Type Definition	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refresh
1 Select Dimension Gender					Clear
3 Distinct Quer	у				2 Generate
1 SELECT DIST	INCT gender AS Gende	r FROM hiring_dat2			

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

5	В	atch Query	4 Generate
	1	SELECT candidate_id AS CandidateId	
	2	,NAME AS Name	
	3	,gender AS Gender	
	4	,source AS Source	
	5	,referral_of AS ReferralOf	
	6	,designation AS Designation	
	7	,team AS Team	
	8	,previous_organisation AS PreviousOrganisation	
	9	,skills AS Skills	
	Pr	revious	Cancel Next

6.3.1.5. Data Restriction

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

- i) Click the 'Add' + icon to add a new box for inserting the data restriction parameter.
- ii) Select a dimension from the drop-down menu.
- iii) Enter the user/group specific custom field to restrict the data.
- iv) Click the 'Next' option to proceed.

				5	6
Getting Data	Data Type Definition	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refresh
2 Dimension	3 User	Property	1	·(+)	
Name	Count	ry		_	
Previous				(4 Cancel Next

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



6.3.1.6. Schedule Data Refresh

The user can schedule a data refresh interval via the 'Schedule Data Refresh' tab.

- i) Enable the Refresh Now option by using a checkmark in the given box.
- ii) Define a time range to refresh data using the following options:
 - a. Daily
 - b. Weekly
 - c. Monthly
 - d. Yearly

(Select any one option from the above-given list to set the data refresh interval)

					6
Getting Data	Data Type Definition	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refresh
Schedule C	onfiguration				
2 DAILY	WEEKLY MOI	NTHLY YEARI	.Y		
O Every 1	day(s)				
O Every Wee	ek Day				
Start time 12	• : 00	*			
1 Refresh Now	,				

- iii) Enable Email Notification by providing a checkmark in the box.
- iv) Provide a valid email address to receive the notification email regarding the Data Store.
- v) Click the 'Finish' option to complete the Data Store creation process.

3	Chable Email Notification	
4	Email Address * admin.user@bdb.ai	
	Previous	Cancel Finish

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

🗮 Data Center	Data Store created successfully					New
Home	Data Store created successfully!					
Data Connectors	All • All •					
Data Sets	Search Data Stores			Showir	ng 317 o	ut of 317
7 Data Stores 8	Sample Data Store	DC	<	Ð	1	i
🚓 🛛 Data Store Meta Data	hiring_store	De	<	0	1	

Option	Name	Task
1	Latest Scheduler Status	Displays the latest scheduler status via a pop-up window



C	Refresh Data	Refreshes data for a datastore
<	Share Data Store	Shares a datastore to/for the selected user(s) or group(s)
Ð	Add Synonyms to Data Store	Adds more synonyms to a datastore
/	Edit	Edit the datastore fields
Î	Remove	Remove a Data Store from the list

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

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

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

🚍 Data Center				2 New
1 Home		le variety of Data. The DataSource source such as Google Analytics, /	· · · · · · · · · · · · · · · · · · ·	Data Connector
Data Connectors		and DataStores, which enables use		Data Set
Data Sets	Click Here To Start Creating	A Connector	3	Data Store
👌 Data Stores				Data Store Meta Data
Data Store Meta Data	• ••			z Data Sheet
Data Sheets		9		ex
	Data Set	Data Store	Data-Store Meta Data	Data Sheet
	Bring your data directly from the source systems using parameterized SQL	Import your data from external sources into Data store of BDB	Bring data from external sources without importing into DataStore	BDB Data Sheet stores information in a visually appealing and easy-to-

- iv) The Data Connectors page opens.
- v) Select a Connector Type from the '**Data Sou rce**' filter (E.g., MySQL data source is selected in the following image).
- vi) Select a data connector from the Data Connector list.
- vii) Click the 'Create Data Store' option provided next to the selected data connector.

🗮 Data Center		New
Home	Data Source	
4 Data Connectors	File 5	
Data Sets	Search Data Connectors	
😂 Data Stores	6 Sample File Data Connector	7 Create Data Store
ata Store Meta Data	file_connector	Create Data Store

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

Step 1- Getting Data

- i) Enter a name for the Data Store. The **Data Connector Name** displays the pre-selected.
- ii) Click the 'Choose File' option to browse a file from the system.
- iii) Select a sheet using the 'Sheet List' drop-down menu.



- iv) Select an option to display Sheet Layout using the drop-down menu out of Column Headers or Row Headers.
- v) Click the 'Next' option to proceed.

0	2	3	4
Getting Data	Data Type Definition	Hierarchy Definition	Data Restrictions
Data Store Name *	[Data Connector Name	
Sample File Data Store		Sample File Data Connector	
Biring Data.xlsx Sheet List * Hiring_227data	*		
4 Sheet Layout * Column Headers	*		
			Cancel Next

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

Step 2- Data Type Definition

- i) Define the required Dimensions, Measures, and Time by interchanging the categories.
- ii) Enable the Dimensions by using a checkmark to avail LOV lookup in the filter panel of the Self-service BI Report.
- iii) Click the 'Next' option to proceed.

Getting Data		Data	2 a Type Definition	Hier	archy Def	inition	Data Restrictions
Dimensions			Measures			Time	
gender	1 123	©	usd_billing	Abc	0	expected_joining_date	Abc 123
source	2 🔽 123	0	experience_Year	Abc	0		
skills	123	0	candidate_id	Abc	0		
previous_organ	123	O	id	Abc	0		
eam	123	O	offered_ctc	Abc	O		
name	123	©	previous_ctc	Abc	©		
ble checkbox for LOV filte	ering						
evious							Cancel

Step 3- Hierarchy Definition

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

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



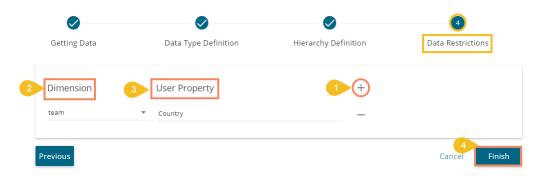
Getting Data	Data Type Definition Hierarchy Definition	4 Data Restrictions
Fields	Hierarchy Definition	+
Abc gender	brill Def- 2 expected joining date: expected joining date:	×
Abe skills	Drill Def- 2	ed_joining_date: - ×
Abc team		
Abc name Previous		Cancel

Step 4- Data Restriction

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

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

- i) Click the 'Add' icon + to add a new box for inserting the data restriction parameter.
- ii) Select a dimension using the drop-down menu.
- iii) Enter the user/group specific custom field to restrict the data.
- iv) Click the 'Finish' option.



- v) A success message appears to confirm the data store configuration.
- vi) The Data Stores list opens.
- vii) The newly created Data Store gets added to the Data Stores list.

🚍 Data Center	5 Data Store has been created successfully						New
Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Stores				Show	ving 11	out of 11
Data Stores	Sample Data Store	0	c	<	0	1	Ŧ
Data Store Meta Data	migtest_hiringbs	0	c	<	0	1	Î
🚉 Data Sheets	Hiring Data Store	0	C	<	Θ	1	Û



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

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

≡	Data Center				2 New
?	Home		ide variety of Data. The DataSource r	- · · · · · · · · · · · · · · · · · · ·	Data Connector
	Data Connectors		se source such as Google Analytics, A and DataStores, which enables user		Data Set
<u></u>	Data Sets	Click Here To Start Creatin	g A Connector	3	Data Store
•	Data Stores			Q ₀	Data Store Meta Data
	Data Store Meta Data			\$	Data Sheet
ŝ	Data Sheets		9		ex
		Data Set	Data Store	Data-Store Meta Data	Data Sheet
		Bring your data directly	Import your data from	Bring data from external	BDB Data Sheet stores
		from the source systems	external sources into	sources without	information in a visually
		using parameterized SQL	Data store of BDB	importing into DataStore	appealing and easy-to-

- iv) Choose an API connector type from the filter panel.
- v) Select a data connector from the displayed list.
- vi) Click the 'Create Data Store' option.

🗮 Data Center		New
😚 Home 🛛 4	Data Source	
Data Connectors	Google Sheet	
Data Sets	Search Data Connectors Hiring Data i	
😑 Data Stores	Hiring Data in Google Sheet for Demo	Create Data Store
Data Store Meta Data 5	Hiring Data in Google Sheet	6 Create Data Store

- vii) The 'Getting Data' tab opens.
- viii) Provide a name for the Data Store. The name of the selected Data Connector gets displayed by default.
- ix) Select a data set using the 'Data Set List' drop-down menu.
- x) Click the '**Next**' option.



1	2	3	4	5
Getting Data	Data Type Definition	Hierarchy Definition	Data Restrictions	Schedule Data Refresh
Data Store Name *				
API Connector based Da	ata Store			
Data Connector Name				
Hiring Data in Google Sł	heet			
Data set List *				
Hiring Data Test New				
				10

- xi) The 'Data Type Definition' tab opens.
- xii) The user can interchange the available Dimensions, Measures, and Time fields to define data.
- xiii) Enable dimension fields with a checkmark to get in the LOV of the Filter pane of the Self-service BI Report.
- xiv) Click the 'Next' option to proceed.

0		2		3		4	5
Getting Data	Data Ty	pe Definitio	on Hierarchy	Definition		Data Restrictions	Schedule Data Refresh
Dimensions			Measures			Time	
currentstatus	12123	©	offeredctc	Abc	0	expectedjoiningdate	Abc 123
comments	123	O	expyrsperctc	Abc	0		
gender	13 🔽 123	0	experience	Abc	0		
referralof	123	©	usdbilling	Abc	0		
source	123	O	previousctc	Abc	0		
team	123	O	candidate_id	Abc	()		
able checkbox for LOV filt	tering						
revious							Cancel Ne

- xv) The 'Hierarchy Definition' tab opens.
- xvi) Add a new Drill Def. box by clicking the '**Add**' icon.
- xvii) Drag and drop Dimension fields or Time field to create a hierarchy (The dragged and dropped 'Time' fields gets divided into three level granularities, E.g., Year>Month>Date).
- xviii) Click the 'Next' tab to proceed.



Getting Data	Data Type Definitio	In 15 Hierarchy Definition	Data Restrictions	5 Schedule Data Refresh
Fields	17	Hierarchy Definition		16+
Abc joiningstatus	******	Drill Def- 1		×
Abc name		Drill Def- 2 expectedjoiningdate: year — expectedjoining	ngdate: month — expectedjoiningdat	e: date — X
Abc previousorganisation Abc designation				^
() expectedjoiningdate				
revious				Cancel Ne

- xix) The 'Data Restrictions' tab opens.
- xx) Click the 'Add' icon.
- xxi) Select a Dimension from the drop-down menu.
- xxii) Enter a User Property based on the inserted custom fields of a specific user(s) or user group(s).
- xxiii) Click the 'Next' option to proceed.

Getting Data	Data Type Definition	Hierarchy Definition	4 19 Data Restrictions	Schedule Data Refresh
21 Dimension gender	22 User Property Country		20-+	
Previous				Cancel Next

- xxiv) The 'Schedule Data Refresh' tab opens.
- xxv) The following options are provided to refresh the data:
 - a. Daily
 - b. Weekly
 - c. Monthly
 - d. Yearly

Select any one option from the above-given list and configure the required information to set the data refresh interval.

xxvi) Select the '**Refresh Now**' option by enabling the box to refresh the Data Store immediately after its creation.



	\checkmark			\sim	_
	Getting Data	Data Type Definition	Hierarchy Definition	Data Restrictions 24	Schedule Data Refresh
	Schedule Configu	ration			
25	DAILY	MONTHLY Y	'EARLY		
	Every 1	day(s)			
	O Every Week Day				
	Start time 12 💌	: 00 🔻			
26	Refresh Now				

xxvii) Enable Email Notification by enabling the option.

xxviii) Provide the Email Address on which you want the notification email to be sent.

xxix) Click the 'Finish' option.



xxx) A success message appears to inform about the creation of a new data store.

xxxi) The newly created Data Store gets added to the Data Stores list.

Data Center		ta Store created successfully!						New
🔂 Home	Data Connector Type							
Data Connectors	All	All 👻						
Data Sets	Search Data Stores					Showin	g 324 oi	ut of 324
			0	C	<	θ	1	
😑 Data Stores	API Connector based Data St	ore		0			-	

Note:

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



🗮 Data Center							New
🚮 Home	Data Connector Type Data Connector						
Data Connectors	MySQL HiringDatatest						
Data Sets	Search Data Stores				Sh	owing 2	out of 2
💩 Data Stores	NitorData	0	C	<	Ð	1	Î
😝 Data Store Meta Data	testhiring	0	G	<	Ð	1	Î

6.3.4. Adding Synonyms to a Datastore

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

😑 Data Cente							New
😽 Home	Data Connector Type Data Connector						
Data Connec	All • All •						
Data Sets	Search Data Stores Sy				Show	ing 3 ou	t of 324
1 😰 Data Stores	ServiceNow_sys_user_group	0	C	<	•	1	Î
🛖 🛛 Data Store M	ta Data ServiceNow_sys_user	0	C	<	Ð	/	Î
Bata Sheets	2 test_nlp synonyms	0	C	<	3 🔁	1	

- iv) All the Attributes get displayed in a list form.
- v) Select a field.
- vi) Click the 'Add Synonyms' option.

	NLP Synonyms: test_nlp syno	onyms 🗙
	Search	
	d	٩
5	Abc Designation	6 Add Values Add Synonyms
4	Abc Gender	Add Values Add Synonyms
	Ø BillStartDate	Add Synonyms
s	② ExpectedJoinningDate	Add Synonyms
		Close

- vii) A new window opens to add synonyms.
- viii) Insert new synonyms in the specified space.
- ix) Click the 'Save' option.



NLP Synonyms: test_nlp sy	nonyms		×
Search	7 Q	Synonyms for : Designation	~
Abc Designation	Add Synonyms		
Abc Gender	Add Synonyms		
Ø BillStartDate	Add Synonyms		
② ExpectedJoinningDate	Add Synonyms		
	8	Add new synonym (Type and press Enter) Official title	
		Close	ave

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



Note: Steps to Add Synonyms for a Dimension Value.

1. Click the 'Add Values' option for a dimension from the displayed list of the data fields.

NLP Synonyms: test_nlp synonyms		×
Search		٩
Abe Comments	Add Values	Add Synonyms
Abc CurrentStatus	Add Values	Add Synonyms
Abe Designation	1 Add Values	Add Synonyms
t 👞 ExperienceCategory	Add Values	Add Synonyms
⊷ Gender	Add Values	Add Synonyms
Abs loinningCtatus	Add Values	Add Suponyme Close

2. A new window opens to search values for the selected Dimension (E.g., Designation in the below image).



- 3. Use the search bar to find specific dimensions.
- 4. Select a Value from the displayed choices.
- 5. Click the 'Add Synonyms' option for the selected value.
- 6. The selected Dimension gets added to the right pane of the window.
- 7. Add synonyms by inserting new synonyms in the specific space.
- 8. Click the 'Save' option to save the added synonyms.

NLP Synonyms: test_	nlp synonym	15)
Search values for : Des	ignation	←	Synonyms for : QA Manager	
Q		3 Q	6 QAManager ×	
Abc QA Manager	5 Add Synoi	nyms		
Abc QA Lead	Add Syno	nyms		
Abc QA Engineer	Add Syno	nyms		
Abc QA Architect	Add Syno	nyms	Add new synonym (Type and press Enter)	
			Manager, QA Manager	
			8 Close	Save

9. A success message appears to assure that the Synonyms dictionary is updated.

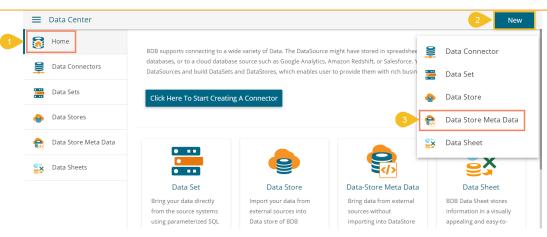
Data Center	9 Synonyms dictionary is updated.						New
🔂 Home	Data Connector Type						
Data Connectors	All • All •						
Data Sets	Search Data Stores Sy				Show	ring 3 ou	it of 324
Data Stores	ServiceNow_sys_user_group	0	G	<	•	1	Î
😞 Data Store Meta Data	ServiceNow_sys_user	0	G	<	Ð	1	Î
😭 Data Store Meta Data	test_nlp synonyms	0	C	<	•	1	Î
Data Sheets							

6.4. Data Store Meta Data

The Data Store Meta Data is a database created to store metadata. It is a structure/index in which the actual data can be stored/written using an application such as ETL.

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





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

	2	3	4
Meta Store Details	Data Type Definition	Hierarchy Definition	Data Restrictions
Data Store Name *			
Sample Data Store Meta Data			
ES Index Name (Optional)			
nlp_support			6
			7 Cancel Next

- viii) Define the data type (The user needs to insert the fields name manually if the ES index is not chosen. Else, the names of the fields get selected from the chosen ES index).
- ix) The users can interchange the Dimensions, Measures, and Time fields.
- x) Click the 'Next' option.

Meta Store Details	8 Data	2 Type Definition	3 Hierarchy Defini		4 Data Restrictions
Dimensions Name	+	Measure Name	+	Time Name	+
Dimensions		Measures		Time	
Article_Code	× 123 (9	MRP	X Abc 🕓		
Article_EAN	× 123 🕓	SGST_Rate	X Abc 🕓		
Description_of_Goods	× 123 🕓	UOM	X Abc 🕓		
Taxable_Value	X 123 🕓	SGST_Amt	X Abc 🕓		
File	X 123 🕓	Qty	X Abc 🕓		
		CGST_Amt	X Abc 🕓		
evious					10 Cancel



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

Options	Description		
Abc	Move to Dimensions		
123	Move to Measures		
 Image: Second sec	Move to Time		

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

Meta Store Details	Data Type Definition 11 Hierarchy Definition	d Data Restrictions
Fields	Hierarchy Definition	12 (+)
Article_Code		×
And Article_EAN	Description_of_Goods — Taxable_Value —	^
Me Description_		
** Taxable_Valu	e	
** File		
Previous		Cancel Nex

- xvi) The 'Data Restrictions' tab opens. The Data Restriction tab allows the user/user group to access data as per the selected 'User Property' options.
- xvii) Select a dimension from the drop-down menu to apply filter values to the data store.
- xviii) Enter a User Property to create a filter parameter based on the user.
- xix) Click the 'Finish' option.

			4
Meta Store Details	Data Type Definition	Hierarchy Definition	16 Data Restrictions
Dimension	18 User Property	+	
Article_Code	 country 	_	
Previous			19 Cancel Finish



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

Data Center	Meta Data-Data Store has been				New
Home	20 saved successfully Search Data-Store Meta Data		Shov	ving 13	out of 13
Data Connectors	Sample Data Store Meta Data	0	¢		Î
Data Sets	bdbLogger	0	•	/	Ĩ
Data Stores	ZyenMerge	0	¢	/	Ĩ
Data Store Meta Data	ZyenMerge	0	Ð	-	Î
Data Sheets	ZyenMerge	0	Đ	1	Î

Option	Name	Task
6	Store Details	Displays the Store information via a pop-up window
•	Add Synonyms to Metadata Store	Redirects the user to add synonyms to the selected Metadata store.
1	Edit	Edits the data store metadata fields
Î	Remove	Removes the data store metadata from the list

6.5. Data Sheet

The Data Sheet can store information in a visually appealing and easy-to-use spreadsheet. It can act as a powerful database that allows businesses to remove the data silos and store the structured data or share it across the organization.

6.5.1. Creating a Data Sheet

The section displays steps to create and list a Data Sheet.

i) Click the 'Data Sheet' option from the 'New' context menu.

			New
er. So	9	Data Connect	tor
50		Data Set	
	•	Data Store	
		Data Store M	eta Data
	ŝ	Data Sheet	

- ii) The Data Sheet Connector page opens.
- iii) Provide a name for the Data Sheet.
- iv) Provide the following information to create the Data Sheet meta-structure:
 - a. Column Name:



- b. Input Type: Select an option out of the provided choices (text/numeric/dropdown/auto complete/checkbox/radio/calendar).
- c. Look Up
- d. Formula/Column
- e. Data Restriction
- f. **Filter:** Enable the filter by putting a checkmark in the given box.
- g. **Delete**: Remove the added data sheet information.
- v) Click the 'Add' \bigoplus icon.

Data Sheet Name							
Sample Data Sheet							
							G
4 Column Name	Input Type	Look Up		Column	Data Restriction	Filter Add/U	
4 Column Name	Input Type	Look Up	¥	Column	Data Restriction		

- vi) The Datasheet Preview gets displayed with the newly created Column(s) added below. The user gets the same set of fields to create another column to the current Data Sheet.
- vii) Click the 'Save' option.

ata Sheet Sample	Name Data Sheet					-				
C	olumn Name	Inc	ut Type	Lool	(Up	Column	Data Restriction	Filter	Add/Update	C
Field (cannot be emp	text	•		•		Ţ		\oplus	×
Data	asheet Prev	iew								
	Year	America	Europe	Asia						
1										

- viii) A success message appears.
- ix) The newly created Data Sheet gets added to the Data Sheets list.



BBB [®]		Q		Ļ	0
🗮 Data Center	8 Datasheet saved successfully				New
🔂 Home	Search Data-Sheet Meta Data		Show	ving 13	out of 13
Data Connectors	Sample Data Sheet		٥	1	Î
Data Sets	datasheet		0	/	
😝 Data Stores	bdb_comp		0	1	Î
Data Store Meta Data	Basic file		٥	/	Î
😫 Data Sheets	Mobile_brand		6	/	Î

Note:

- a. Click the '**Refresh**' $^{\bigcirc}$ icon to refresh the Column design fields. The data in the design area gets cleared.
- b. Click the 'Delete' \bigotimes icon to delete the selected column.

6.5.2. Publishing a Data Sheet

The user can publish a Data Sheet by clicking the '**Publish**' icon.

- i) Navigate to the Data Sheets list.
- ii) Select a Data Sheet from the list.
- iii) Click the '**Publish**' icon for the selected Data Sheet.

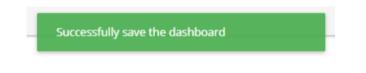
🗮 Data Center		New
Home	Search Data-Sheet Meta Data	Showing 34 out of 34
Data Connectors	Sample Data Sheet	
Data Sets	Sample Records	
💩 Data Stores	sheetFor27jan	○ / ■
🤤 Data Store Meta Data	CheckboxTest	△ / î
🚉 Data Sheets	Profit_Margin	o / i

- iv) The Publish Data Sheet window opens.
- v) Select the user(s) by using the USER tab/ user group(s) by using the USER GROUP tab.
- vi) Click the 'Save' option.

Name	Sample Dat	ta Sheet		
USER US	SER GROUP	EXCLU	JDE USER	
testuser			jubilant	
rabithpk			jubilantvetest	
testuser1		\bigcirc		
ajith.r				
vimal.m				
bijeesh.op		<		
kalanidhi.m		44		
georjo.johan				
		44		



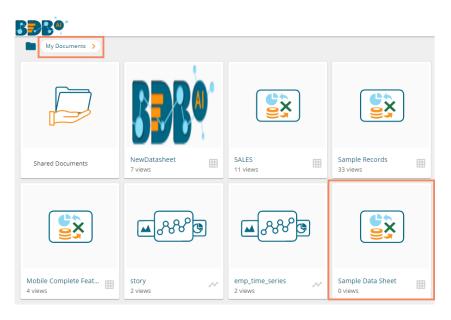
vii) A success message appears to inform the user that the dashboard has been saved.



viii) Another success message appears to inform the user the datasheet has been updated successfully.



ix) The selected Data Sheet gets published under the My Documents space.



6.5.2.1. Opening a Published Data Sheet.

i) Use a click on the published Data Sheet to open it.



ii) The Data Sheet opens displaying the data table.

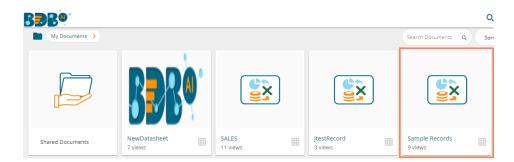


an	nple Reco	rds First	row: 0	# of rows : 100	G	-			+ 🏗 🖥
	Year	America	Europe	Asia					
1	2008	2009	2010	2011					
2	2009	60	100	65					
3	2010	100	80	70					
4	2011	120	85	75					
5	2012	130	95	80					
6	2013	160	75	85					
7	2014	170	90	90					
3	2015	180	110	95					
9	2016	170	120	100					

6.5.2.2. Copying Excel Data into a Published Data Sheet

The user can create a meta-structure of the Data Sheet using the Data Center module and later insert data from an excel file. The user can directly copy and paste data to the published Data Sheet.

i) Open a published Datasheet from My Documents.



ii) The meta-structure of the selected Data Sheet opens.



iii) Copy the required data from an excel sheet.

Fi	ile	Home	e Inse	ert Pa	ige La	yout F	ormulas	Data	Revi
ſ	<u>ک</u>	<u>د</u> ا	Calibri		. 11	~ A^ /	∧ • <u>=</u> =	=	
	-LL [<u>-</u>							
	∍ste ∽ ≼	3	ΒI	<u>u</u> ~ <u>H</u>	~	🖉 ~ A	~ = =	= <u>•</u>	•=
Clipboard Is Font Is Alignmer									
A2	2	Ψ	: >	< 🗸	f_{x}	2008			
			-		-	-			
	А		В	с	D	E	F	G	
1	Year	North	America	Europe	Asia	E	F	G	
2	Year 2008	North	America 50	Europe 150	Asia 60	E	F	G	
-	Year 2008 2009	North	America	Europe	Asia	E	F	G	
2 3	Year 2008	North	America 50	Europe 150	Asia 60	E	F	G	
2 3	Year 2008 2009	North	America 50 60	Europe 150 100	Asia 60 65	E	F	G	
2 3 4	Year 2008 2009 2010	North	America 50 60 100	Europe 150 100 80	Asia 60 65 70	E	F	G	
2 3 4 5	Year 2008 2009 2010 2011	North	America 50 60 100 120	Europe 150 100 80 85	Asia 60 65 70 75	E	F	G	
2 3 4 5 6 7	Year 2008 2009 2010 2011 2012	North	America 50 60 100 120 130	Europe 150 100 80 85 95	Asia 60 65 70 75 80	E	F	G	
2 3 4 5 6	Year 2008 2009 2010 2011 2012 2013	North	America 50 60 100 120 130 160	Europe 150 100 80 85 95 75	Asia 60 65 70 75 80 85	E	F	G	
2 3 4 5 6 7 8	Year 2008 2009 2010 2011 2012 2013 2014	North	America 50 60 100 120 130 160 170	Europe 150 100 80 85 95 75 90	Asia 60 65 70 75 80 85 90	E	F	G	



- iv) Paste it to the Data Sheet metadata-structure.
- v) Click the 'Save' icon to save the copied data.

	My Docum	nents 🗲 Samp	ble Records	
San	nple Reco	ords First	row : 0	# of rows : 100
	Year	America	Europe	Asia
1	2008	50	150	60
2	2009	60	100	65
3	2010	100	80	70
4	2011	120	85	75
5	2012	130	95	80
6	2013	160	75	85
7	2014	170	90	90
8	2015	180	110	95
9	2016	170	120	100

vi) The copied data from excel gets saved to the Data Sheet.

6.5.2.3. Filtering the Data

i) Click the '**Filter**' icon from the Data Sheet Preview page.

	My Docum	ents > Samp	ole Records	
ar	nple Reco	rds First	row : 0	# of rows : 100
	Year	America	Europe	Asia
	2008	50	150	60
2	2009	60	100	65
	2010	100	80	70
1	2011	120	85	75
5	2012	130	95	80
5	2013	160	75	85
7	2014	170	90	90
в	2015	180	110	95
)	2016	170	120	100

- ii) The 'Filters' window opens.
- iii) Provide the following information
 - a. Field Name
 - b. Value
 - c. Click the 'Apply' option.

Apply Filter		+ ×
Field Name	Value	Close
Year 🔽	2008	
	Cancel	Ok

- iv) The data preview gets filtered as per the inserted condition.
- v) Click the 'Clear Filter' icon to clear the applied filter condition.



	My Documents > Sample Records									
Sam	ple Records	5	First ro	w : 0	# of rows : 100	C 😑				
	Year	Ame	rica	Europe	Asia					
1	2008	50		150	60					

vi) The filter condition gets cleared and the original values appear for the Data Sheet.

6.5.2.4. Adding a New Row

- i) Click the 'Add Row' icon from the preview page of the Data Sheet.
- ii) A new row gets added at the bottom.

	My Docum	ents / Sam	ole Records				I
am	ple Reco	rds First	row : 0	# of rows : 100	9 -		+ 🗊
	Year	America	Europe	Asia			
1	2008	50	150	60			
2	2016	170	120	100			
3	2009	60	100	65			
4	2010	100	80	70			
5	2011	120	85	75			
6	2012	130	95	80			
7	2013	160	75	85			
8	2014	170	90	90			
9	2015	180	110	95			
10							

6.5.2.5. Deleting a Row

- i) Select a row from the data sheet preview.
- ii) Click the '**Delete Row**' icon.

Year America Europe Asia 1 2008 5 150 60 2 2016 170 120 100 3 2009 60 100 65 2 2010 120 85 75 6 2012 130 95 80 7 2013 160 75 85 8 2014 170 90 90 9 2015 180 110 95		My Docume	and a same	ble Records					
1 208 50 150 60 2 2016 170 120 100 2 2016 170 120 100 2 2010 60 100 65 2 2011 100 80 70 2 2012 130 95 80 2 2013 160 75 2 2013 160 75 2 2013 160 95	amp	le Recor	rds First	row: 0	# of rows : 100	G ÷			+ 💼
2 2016 170 120 100 2 2016 170 100 65 2 1010 100 80 70 2 20110 120 85 75 2 2013 160 75 80 2 2013 160 75 85 2 2013 160 95 80 2 2014 170 90 90	١	Year	America	Europe	Asia				Ŭ
3 2009 60 100 65 4 2010 100 80 70 5 2011 120 85 75 6 2012 130 95 80 7 2013 160 75 85 8 2014 170 90 90	1	2008	50	150	60				
4 2010 100 80 70 5 2010 1200 85 75 6 2012 130 95 80 7 2013 160 75 85 8 2014 170 90 90	2	2016	170	120	100				
x x x x x x x x x x x x x x x x x x x x x x x x x x x x	3	2009	60	100	65				
a 2012 130 95 80 a 2013 160 75 85 a 2014 170 90 90	4	2010	100	80	70				
7 2013 160 75 85 8 2014 170 90 90	5	2011	120	85	75				
8 2014 170 90 90	6	2012	130	95	80				
	7	2013	160	75	85				
9 2015 180 110 95	8	2014	170	90	90				
	9	2015	180	110	95				

iii) The selected row gets deleted from the Data Sheet preview.

Note: The user should click the '**Save**' icon after adding or removing new row(s) to save the updated data in the selected Data Sheet.



+ 🗊 🔒

Sam	ple Records	5	First ro	w : 0	# of rows : 100	C	Ŧ
	Year	Amer	ica	Europe	Asia		
1	2008	50		150	60		
2	2016	170		120	100		
3	2009	60		100	65		
4	2010	100		80	70		
5	2011	120		85	75		
6	2012	130		95	80		
7	2013	160		75	85		
8	2014	170		90	90		
9	2015	180		110	95		

6.5.3. Editing a Data Sheet

i) Click the '**Edit**' icon from the Data Sheet list page.

📃 Data Center		New
Home	Search Data-Sheet Meta Data	Showing 34 out of 34
Data Connectors	Sample Data Sheet	○ (?) i
Data Sets	Sample Records	
🖕 Data Stores	sheetFor27jan	Q / 1
🤮 Data Store Meta Data	CheckboxTest	0 / I
Data Sheets	Profit_Margin	0 / I

- ii) The 'Data Sheet Details' tab opens for the selected Data Sheet.
- iii) The user can edit the required information.
- iv) Click the '**Next**' option.

0	0
Data Sheet Details Data Sheet Name Sample Data Sheet	Meta Data Design
	Cancel Next

- v) The 'Meta Data Design' page opens.
- vi) Click the 'Finish' option.



	Data She	et Details				_	2 Data Design		
Add/Update	Column Name	Input Type		Look Up	Column		Data Restriction	Filter	C Delete
(+) Tea	m	text	•				Ţ		8
Datasheet Pre	eview								
Salary	Designation								
Previous							Cance		Finish

vii) A success message appears to inform the user that the selected Data Sheet has been updated.

BBB [®]	
😑 Data Center	Datasheet update successfully
Home	ata-Sheet Meta Data
Data Connectors	Data Sheet
Data Sets	Data Sheet
Data Stores	
🚓 Data Store Meta Data ARRShi	et
🙀 Data Sheet Channe	ls

6.5.4. Removing a Data Sheet

i) Click the '**Delete**' icon from the Data Sheet list page.

😑 Data Center		New
Home	Search Data-Sheet Meta Data	Showing 34 out of 34
Data Connectors	Sample Data Sheet	○ / (î)
Data Sets	Sample Records	<u>د</u> ک
Data Stores	sheetFor27jan	0 / I
😪 Data Store Meta Data	CheckboxTest	0 / Î
🚉 Data Sheets	Profit_Margin	0 / Î

- ii) The Remove Data Sheet window opens to confirm the deletion of the selected Data Sheet.
- iii) Select the '**Yes**' option.

			_
	Remove Data Sheet		
l '	Do you want to remove the selecte	ed I	Data Sheet ?
	Nc)	Yes



iv) A success message appears, and the selected Data Sheet gets removed.

BBB®		Q		4	0
📃 Data Center	Metadata deleted successfully!				New
Home	Search Data-Sheet Meta Data		Sho	wing 37	out of 37
Data Connectors	dsarr	0	Ģ		Î
📑 Data Sets	ARR	۵	Ģ	/	ĩ
😑 Data Stores	ARRSheet	6	Ţ	/	Î
😪 Data Store Meta Data	Channels	6	Ţ	/	Ĩ
Data Sheet	FamilyMembers	۵	Ţ	/	Î

7. Options

The user can access options like Create New Folder, link a URL, or Create New Story on the homepage of the BDB Platform.

The user can access these Options either by clicking the '**Options**' icon or using the right-click on the blank space of the BDB Platform as displayed below.

BBB®				Q	III 🗘 🛛 🕕
Lir	eate New Folder nk a URL eate New Story		5	earch Docume Q Sort b	Create New Folder Link a URL Create New Story
Shared Documents	NewDatasheet 7 views	SALES Il views	Sample Records 43 views	JubiDatasheets	story N 5 views

7.1. Creating a Folder

i) Select the 'Create New Folder' from the Options context menu.

Create New Folder
Link a URL
Create New Story

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



Create New Folder		×
_{Name} * Sample Folder		
Description		ĥ
	Close	Save

- v) A success message appears.
- vi) The newly created folder gets added to the selected document space.

My Documents		Folder has been created successfully	ea
Shared Documents	Documents	Sample Folder 📄	

• Options Assigned to a Folder

A single folder is credited with various operations in a context menu by using a right-click on it as displayed below:

	Open in New Tab
	Properties
	Add to Favorites
Sample Folder	Create New Folder
Sample Folder	Create New Story
	Link a URL
	Move to
	Сору
	Rename
	Delete

7.1.1. Open in New Tab

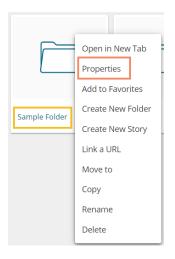
- i) Select a folder.
- ii) Select the '**Open in New Tab**' option using the Folder options context menu.
- iii) The concerned folder opens in a new tab.



🖏 BDB: Decision Platform X 🖏 BDB: Decision Platform X 🕂				- 0 ×
← → C		ଭ୍	🖈 😁 🖬	ncognito :
幹 YUJIA: platform 🥱 BDB: Decision Platf 👌 BDB: Decision Platf 👌 BDB: Decision Platf				
	Q		<mark>ل</mark> 12	? P
My Documents > Sample Folder > Search Docume C	. Sort b	y: None ·		÷
Create New Folder				
Link a URL				
Create New Story				

7.1.2. Properties

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

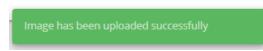


- iii) The folder properties open.
 - a. Click the 'Browse' option to update the image.
 - b. Click the 'Save' option to save the update.

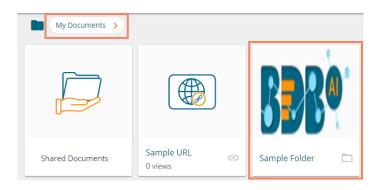
Properties	×
Sample Folder	
Created by:	Adminuser
Туре:	Folder
Version:	6.0.0
Where:	My Documents
Created:	Wed Mar 10 2021 20:01:31 GMT+05:30 (India Standard Time)
Modified:	Wed Mar 10 2021 20:01:31 GMT+05:30 (India Standard Time)
Description:	
Upload Image: Br	owse
	Close Save



iv) A success message appears, "Image has been updated successfully!"



v) The image gets uploaded.

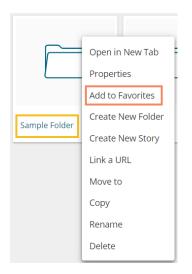


Note: Click the 'Close' option to close the folder properties.

7.1.3. Adding/Removing a Folder to/from Favourites

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

i) Select the 'Add to Favorites' option from the Folder context menu.



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

Folder Added to favorites

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



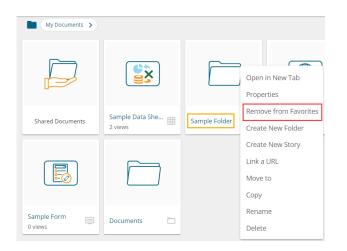
BBB®	
Favorites >	
Sample Folder	Documents

- iv) Open the 'Favorites' documents space.
- v) Use the right-click on the folder that you wish to remove.
- vi) The 'Remove from Favorites' option.
- vii) Click the 'Remove from Favorites' option.

Favorites >	
	Open in New Tab
Sample Folder	Remove from Favorites

OR

Navigate to My Documents and use right-click on the same folder. Click the '**Remove from Favorites**' option.



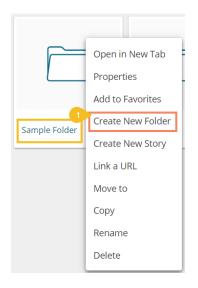
viii) A message, "Folder removed from Favorites" appears on the screen, and the selected folder gets removed from the 'Favorites' document space.



BBB [®]			
Favorites >	Folder removed from favorites		
Documents 🗖			

7.1.4. Creating a New Folder (Sub-Folder)

i) Select the 'Create New Folder' option by using right-click on a Folder.



- ii) The Create New Folder window opens.
- iii) Fill in the following information:a. Name: Enter a folder nameb. Description: Describe the folder (optional)
- iv) Click the 'Save' option.

2	Create New Fol	der	×
3	Name* Sample Sub Folder		
	Description		<i>h</i>
ľ			Close Save
L	_		

- v) A success message appears for the folder creation.
- vi) A new (sub) folder gets created inside the selected folder.



My Documents	> New Folder >	Folder has been created successfully	e
Sample URL 2 views	G Sample Sub Folder		

Note: The user can create multiple folders under a folder.

7.1.5. Creating a NewStory

i) Select the 'Create New Story' option from the Folder context menu.

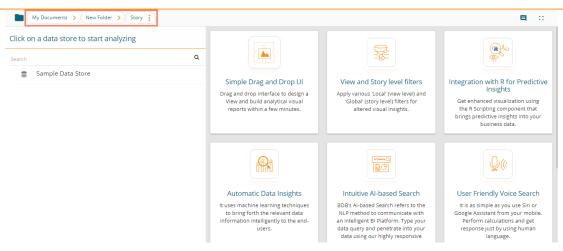
	Open in New Tab
	Properties
	Add to Favorites
Sample Folder	Create New Folder
Sample Folder	Create New Story
	Link a URL
	Move to
	Сору
	Rename
	Delete

- ii) The 'Create New Story' window opens.
- iii) Enter a title for the story document.
- iv) Describe the story document (optional).
- v) Click the 'Save' option.

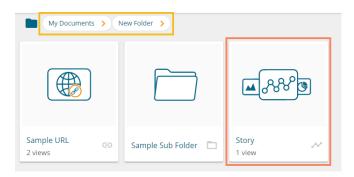
Create New Story	1	×
Name * Story		
Description		
1	Close	Save

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





- vii) Navigate to the folder.
- viii) The Story document gets added to the selected folder.



7.1.6. Linking a URL

The user can connect a URL to the required platform documents.

i) Select the 'Link a URL' option from the context menu that opens by clicking on a folder.

	Open in New Tab	
	Properties	
	Add to Favorites	
Sample Folder	Create New Folder	
Sumple Folder	Create New Story	
1	Link a URL	
	Move to	
	Сору	
	Rename	
	Delete	

- ii) The Link a URL window opens.
- iii) Enter a name for the URL.
- iv) Provide the URL link that you wish to add in the 'Type URL' field.



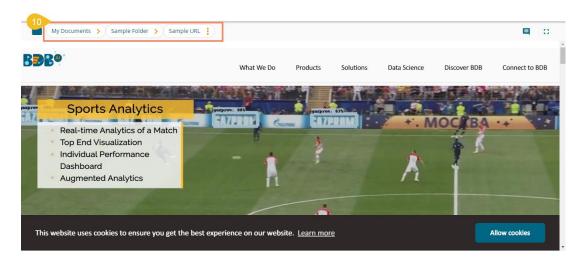
- v) Describe the URL (optional).
- vi) Navigate to the 'URL Parameter' tab to add parameters (Optional).
- vii) Click the 'Save' option.

Link a URL	×
Add Details 6 URL Parameter	
Sample URL	
4 Type URL* https://bdb.ai/	<u> </u>
5 Description	11
c	Close Save

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

	My Documents > Sample Folder >	Link URL has been created successfully	е
9	Sample URL 0 views		

x) The user can see the linked URL by opening the created sample URL.





7.1.6.1. Adding or Removing a URL Parameter:

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

- i) Navigate to the 'URL Parameter' tab.
- ii) Two options for adding URL properties get displayed
 - a. Add User Properties
 - b. Add System Properties

Link a URL	×
Add Details URL Parameter	
+ Add User Properties + Add System Properties	
Close	Save

- iii) By clicking the 'Add User Properties' option, the user requires to add Parameter Name and Parameter Values.
- iv) By clicking the 'Add System Properties' option, the user requires to add Parameter Name and Select a system property via a drop-down menu.
 - a. By selecting the '**User Properties**' option, the administrator needs to insert a valid user custom field. (E.g., In the below given image, parameter '**Param 1**' passes the defined value for the '**city**' custom field provided for the selected user).
 - By choosing the 'System Properties' option, it requires the administrator to select an option from the available system properties drop-down menu. (E.g., in the below given image, parameter 'Param 2' passes the authentication 'Token' as system properties to link the URL).
- v) Click the 'Save' option to save the information.

e Folder >		Search Docume Q Sc
Link a URL		×
Add Details URI	. Parameter	
+ Add User Properties	+ Add System Properties	
3 Parameter Name	Parameter Value	
Param 1	city	×
4 Parameter Name	Select System Properties	
Param 2	Token 👻	×
		5
		Close Save

Note:

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



7.1.7. Moving a Folder

i) Select the 'Move to' option from the Folder context menu.

My Documents >			s	earch Docume Q	Sort by : Name 🖌
					Open in New Tab Properties Add to Favorites
Shared Documents	Dashboards	Data Sheets	Folders 🗖	Sample Folder	Create New Folder Create New Story Link a URL Move to Copy Rename Delete

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

Move to		×
My Documents		
Search		
Data Sheets		>
Dashboards		>
Stories		>
Folders		>
		_ !
	Close	Save

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



Move to	×
← Folders	
Search	
	ć
	Close Save

vii) A success message appears.

BBB®				Q	
My Documents >		Folder moved successfully		earch Docume Q Sort by :	
Shared Documents	Dashboards 🗖	Data Sheets 🗖	Folders	Stories 🗖	

viii) The folder gets moved to the targeted folder.

My Documents > Folders >				
Miscellaneous	ODC Recruitment 🛅	Sample Folder 🛛 🗖		

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

7.1.8. Copying a Folder

The system user can copy a folder and paste it to a different folder.

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



	Open in New Tab
	Properties
	Add to Favorites
	Create New Folder
New Folder	Create New Story
	Link a URL
	Move to
1	Сору
	Rename
	Delete

Select another folder and use the right-click to get the 'Paste' option. Click the 'Paste' option.
 OR

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

BBR [@]			
My Documents >			Search D
Shared Documents	Documents	Properties Remove from Favorites Create New Folder Create New Story Link a URL Move to Copy Paste Rename Delete	Create New Folder Link a URL Paste Create New Story

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



vi) The copied folder gets pasted successfully with a different name.
 E.g., The following image shows that a folder 'New Folder' from 'My Documents' is named Copy of New Folder and has been pasted in the same document space.



My Documents >			Sea
Shared Documents	Documents 🗖	New Folder	Copy of New Folder 🗖

7.1.9. Renaming a Folder

- i) Select the '**Rename**' option from the Folder context menu.
- ii) The Rename window opens.

	Open in New Tab
	Properties
	Add to Favorites
	Create New Folder
Sample Folder	Create New Story
	Link a URL
	Move to
	Сору
	Rename
	Delete
	Delete

- iii) Enter a **New Name** for the folder.
- iv) Click the **'Save'** option.

Rename		×
New Name * New Folder		
	Close	Save

- v) A success message appears.
- vi) The folder gets renamed.



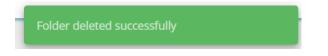
BBB@								Q
My Documents >			Folder rename			6	earch Docume Q	Sort by :
)]]
Shared Documents	Dashboards		Data Sheets	-	Folders		New Folder	

7.1.10. Deleting a Folder

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

Delete		×
Do you want to delete	selected folder ?	
	Close	Delete

iv) A success message appears to confirm the action.



v) The selected folder gets removed from the platform.

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

7.2. Linking a URL

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

i) Select the 'Link a URL' option from the Options context menu.



- ii) The Link a URL window opens displaying the 'Add Details' tab.
- iii) Enter a name for the URL.



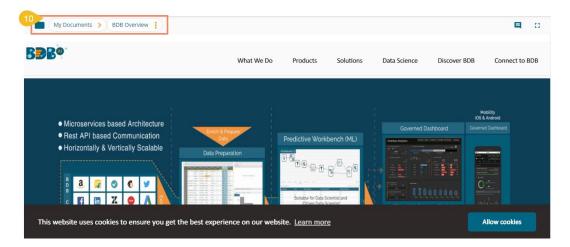
- iv) Provide the URL link that you wish to add in the 'Type URL' field.
- v) Describe the URL (optional).
- vi) Navigate to the 'URL Parameter' tab to add parameters (Optional).
- vii) Click the 'Save' option.

2	Link a URL	×
3 4 uments	Add Details 6 URL Parameter Name * BDB Overview Type URL * https://bdb.ai/product-overview	
5	Description 7 Close Sa	<i>iv</i> e

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

My Documents	8	Link URL has been crea	ted successfully
	9		
Shared Documents	Documents 🗖	BDB Overview O views	

x) The user can see the linked URL by opening the created sample URL.

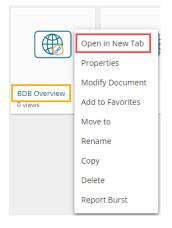




• Operations Assigned to a URL

7.2.1. Open in New Tab

- i) Select a linked URL document.
- ii) Select the '**Open in New Tab**' option from the context menu.



iii) The concerned document with the linked URL gets opened in a new tab.

👔 BDB: Decision Platform X 👌 BDB: Decision Platform X	+						
← → C app.bdb.ai/home/#/home;/view/441548806/5						Q	🕸 🌲 Incognito 🚦
🚏 YUJAA: platform 🥱 BDB: Decision Platf 👸 BDB: Decision Platf 👸 BD	DB: Decision Platf						
					Q		4 ¹² ⑦ P
My Documents > BDB Overview							
BBB®	What We Do	Products	Solutions	Data Science	Discover	BDB	Connect to BDB
Hest API based Communication Horizontally & Vertically Scalable	kh & Prepare Obstant	Predictive Work	Cientist and				
This website uses cookies to ensure you get the best ex	perience on our wel	bsite. <u>Learn mor</u>	<u>re</u>			All	low cookies

7.2.2. Properties

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



	Open in New Tab
	Properties
	Modify Document
BDB Overview 0 views	Add to Favorites
	Move to
	Rename
	Сору
	Delete
	Report Burst

- iii) The 'Properties' window appears with four options.
 - a. Properties: Properties tab of the linked URL document gets displayed.
 - i. Click the '**Browse**' option to upload an image (A success message appears after the image gets uploaded).
 - ii. Click the 'Save' option to save the updates.

Properties	×
BDB Overview	
Properties Sha	are with User Share with Group Exclude Users
Created by:	Adminuser
Туре:	Link URL
Version:	6.0.0
Where:	My Documents
Created:	Fri Mar 12 2021 14:30:00 GMT+05:30 (India Standard Time)
Modified:	Fri Mar 12 2021 14:30:00 GMT+05:30 (India Standard Time)
Description:	
Upload Image: Bro	wse
Open document link:	https://app.bdb.ai/home/#/opendocument?data=eyJ1c2VyIjoi
	Close Save

- iii. A success message appears after uploading the image.
- iv. The image gets uploaded.



Note: Click the '**Copy Link**' \square icon to copy the open document link of the Link URL. The copied Open link can be pasted to the desired place.



Properties			×
G BDB Overview			
Properties SI	are with User	Share with Group	Exclude Users
Created by	Adminuser		
Туре	Link URL		
Version	6.0.0		
Where	My Documents		
Created	Fri Mar 12 2021	14:30:00 GMT+05:30 (Ind	ia Standard Time)
Modified	Fri Mar 12 2021	14:30:00 GMT+05:30 (Ind	ia Standard Time)
Description			
Upload Image: Br	owse		
Open document link:	https://app.bdb.	ai/home/#/opendocumer	t?data=eyJ1c2VyIjoi
			Close Save

- **b.** Share with User: The linked URL document is shared with the selected user(s).
 - 1. Select the 'Share with User' on the Properties window.
 - 2. Search a specific user by using the search bar.
 - 3. Select a user or all the users by using the checkmarks in the given box(es).
 - 4. Click the 'Save' option.
 - 5. A success message appears stating that the document privilege is updated.

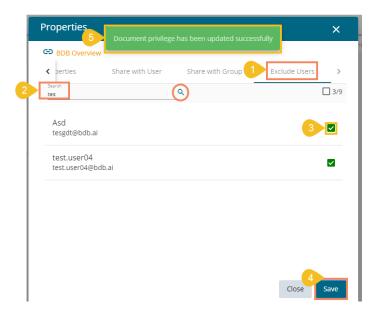
< Properties 1 Search	Share with User	Share with Group	Exclude
use	۵		3/
ETL etluser@bdbizviz.com			3 🔽
tokentest userwithouttoken@bdb.ai			
User abc@xyz.com			

- 6. The document gets shared with the selected user(s).
- c. Share with Group: The linked URL document can be shared with the selected group.
 - 1. Select the 'Share with Group' option from the Properties window.
 - 2. Search for a specific User group by using the search bar.
 - 3. Select one group or all the groups by using the checkmark(s) in the given box(es).
 - 4. Click the 'Save' option.
 - 5. A success message appears stating that the document privilege is updated.



	Properties 5 Docum	ent privilege has been up	dated successfully	×
	G BDB Overview	F	, ,	
	< Properties	Share with Use	Share with Group	Exclude >
2	Search	Q		2/831
	bdb			3
	BS Dev			
	bulk			
L	customTests			
L	Dashboard Designer			
L	datacleansing			
	dataprep			
				Close Save

- 6. The document gets shared with the selected group(s).
- **Note:** If a URL file is shared with the user(s) or group(s) via the '**Share With**' option, then it opens as a view-only copy for the selected user or selected user group.
 - d. Exclude User: The selected user cannot access the linked URL file.
 - 1. Select the 'Exclude User' on the Properties pop-up screen.
 - 2. Search for a specific user using the Search bar.
 - 3. Select a user or all the users by using the checkmark(s) in the given box(es).
 - 4. Click the 'Save' option.
 - 5. A success message appears, and the document privilege gets updated to exclude the selected user(s).



7.2.3. Modifying a Document (URL information)

i) Select the 'Modify Document' from the URL options context menu.

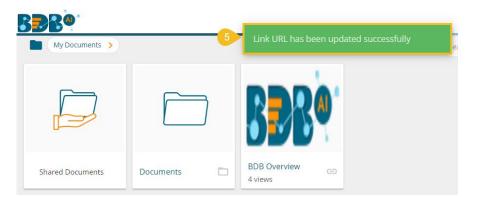


	Open in New Tab
	Properties
	Modify Document
BDB Overview 0 views	Add to Favorites
	Move to
	Rename
	Сору
	Delete
	Report Burst

- ii) The Modify Linked URL window opens.
- iii) The user can modify the following information (if required).
 - a. URL Name
 - b. URL Link
 - c. Description
 - d. The URL Parameters can be edited from the URL Parameter tab (if needed).
- iv) Click the 'Save' option.

Modify linke	d URL		×
Edit Details Name * BDB Overview	URL Parame	er	
Type URL * https://bdb.ai/pro	duct-overview		ĥ
Description			h
			Close Save

v) A success message appears to inform the user that the selected URL has been updated.

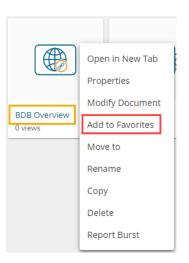


7.2.4. Adding/Removing a URL Document to/from Favorites

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

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

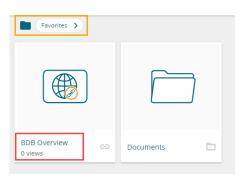




iii) A message, "Document added to Favorites" appears.



iv) The selected link URL gets added to the 'Favorites' section.



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

BBB®	
Favorites >	
Open in New Tab	ĥ
BDB Overview 0 views	tes

OR

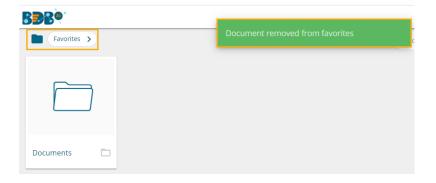
Navigate to the original URL document and use the right-click to open the context menu. The '**Remove from Favorites**' option appears.



Click the 'Remove from Favorites' option.

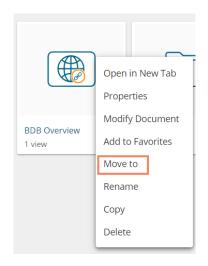
My Documents				Search Documents
				Open in New Tab Properties
Shared Documents	Sample Data Sheet	Sample Folder	BDB Overview 0 views	Modify Document Remove from Favorites
				Move to
				Rename
				Сору
				Delete Report Burst

- viii) A message appears stating, "Document removed from Favorites" and the selected document with linked URL gets removed.
- ix) The URL file gets removed from the 'Favorites' section.



7.2.5. Moving a URL File

i) Select the 'Move to' option from the URL context menu.



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



Move to	×
My Documents	
Search	
Data Sheets	>
Dashboards	>
Stories	اد
Folders	>
Sample Folder	>
	Close Save

- v) The user gets redirected to the next screen with the selected folder displayed on the top.
- vi) Click the '**Save**' option.

Move to	×	De
← Sample Folder		l
Search		
folder	>	
Ð		olo
		1
	Close Save	I

vii) A message appears to notify the user that the concerned document has been moved.

My Documents			Document moved successfully			e
]]		
Shared Documents	Dashboards		Data Sheets		Folders	

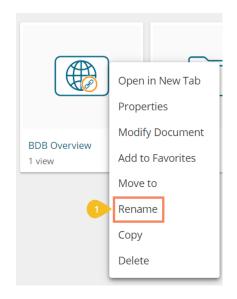
viii) The concerned document with a linked URL gets moved to the selected space.



BBB@						
My Documents > Sample Folder >						
BDB Overview 🕞 1 view	folder					

7.2.6. Renaming a URL Document

i) Select the '**Rename**' option from the URL Options menu.



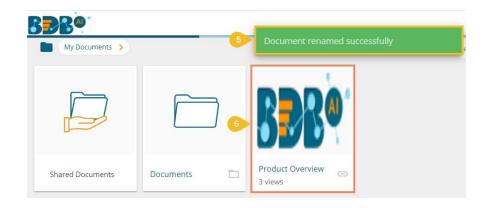
- ii) The Rename window opens.
- iii) Enter a New Name for the URL document.
- iv) Click the 'Save' option.



v) A success message appears.



vi) The linked URL document gets renamed.



7.2.7. Copying a URL Document

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

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

	Open in New Tab
	Properties
	Modify Document
Product Overview 2 views	Add to Favorites
2 views	Move to -
	Rename
	Сору
	Delete

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

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.

		Properties Remove from Favorites Create New Folder	()
Shared Documents	Documents	Create New Story vie Link a URL	w _©
		Move to Copy Paste Rename Delete	Create New Folder Link a URL Paste Create New Story



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

Paste		×
Name * Copy of Product Overview		
	Close	Save
	V	_

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

B B R [®]			
My Documents >			Sea
		B BRO	BBRO
Shared Documents	Documents	Product Overview 3 views	Copy of Product O 😑 3 views

7.2.8. Deleting a URL Document

- i) Select the 'Delete' option from the URL Options context menu.
- ii) A new window appears to confirm the deletion.
- iii) Click the 'Delete' option.

Delete	[] & /	×
Do you want to delete sel	ected document	?
	Close	Delete

iv) The selected URL file gets removed.

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



7.3. Creating a Story

i) Right-click anywhere on the My Documents or Public Documents blank space to get the context menu.

OR

- Click the Options icon to open the context menu.
- ii) Select the 'Create New Story' option from the context menu.

BBR ^{®®}					Q		Ċ2	?	N
My Documents]	Create New Folder Link a URL Create New Story	Search Docume Q	Sort by	Link a	New Fo	lder	Ð
Shared Documents	Documents								

- iii) The 'Create New Story' window opens.
- iv) Enter a title for the story document.
- v) Describe the story document (optional).
- vi) Click the 'Save' option.

3 Create New Story	×
4 Name * Story	
5 Description	
I	<i>h</i>
	Close Save

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

My Documents > Story				■ 0
Click on a data store to start analyzing				(R) (A)
Search	۹		-45-	<u></u>
Sample Data Store		Simple Drag and Drop UI	View and Story level filters	Integration with R for Predictive Insights
		Drag and drop interface to design a View and build analytical visual reports within a few minutes.	Apply various 'Local' (view level) and 'Global' (story level) filters for altered visual insights.	Get enhanced visualization using the R Scripting component that brings predictive insights into vour business data
				Q((
		Automatic Data Insights It uses machine learning techniques to bring forth	Intuitive Al-based Search BDB's Al-based Search	User Friendly Voice Search It is as simple as you use

viii) Navigate back to space where the story document creation was intended (i.e., Navigate to 'My Documents' space).

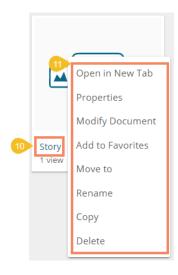
www.bdb.ai



ix) The newly created Story document gets added to space.



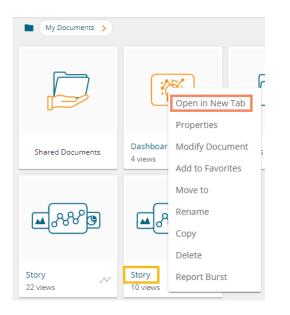
- x) Select an existing story document.
- xi) Use the right-click on it to get the credited operations for a story in a context menu.



7.3.1. Open in New Tab

The user can open the selected story in a new tab by using this option.

i) Click the 'Open in New Tab' option from the options menu.





ii) The concerned story opens in a new tab.

6 BD8: Decision Platform × 6 BD8: Decision Platform × +	F dant				
← → C app.bdb.ai/home//#/home/view/9830413/12					९ ☆ 😬 :
👯 Apps 📦 YUJAA: platform 🔇 BDB: Decision Platf 🎽 BDB: Decision Platf 🎽 BDB:	Decision Platf				
			Q		4 ¹² ? P
My Documents > Story :					Π 0
Click on a data store to start analyzing		9			(R)Ao
Search Q					ж.
ExpSummary	Simple Drag and Drop	View and Story level		Integr	ation with R for
ExpData	UI Drag and drop interface to	filters Apply various 'Local' (view			ictive Insights anced visualization
ExpData	design a View and build analytical visual reports	level) and 'Global' (story level) filters for altered			g the R Scripting onent that brings
Se wttestmrv	within a few minutes.	visual insights.			ctive insights into chusiness data
S WTGA					
Test					Ų((
SalesAndCollection	Automatic Data Insights	Intuitive Al-based		Usor	Friendly Voice
Excel Test	It uses machine learning	Search		User	Search

7.3.2. Properties

- i) Select the '**Properties**' option from the Options menu.
- ii) A new screen pops-up with four options:
 - **a. Properties:** Displays the basic properties of the selected Business Story. The user can upload an image by using the '**Browse**' option.
 - i) Click the '**Copy link**' icon to copy the open document link.
 - ii) Select an option out of 'Can view' and 'Can edit' options by using the radio button.
 - iii) Click the 'Save' option to save the properties settings.

Properties		×
✓ Story		
< Properties	Share with User Share with Group Exclude User	s
Created by:	Adminuser	
Туре:	Business Story	
Version:	6.0.0	
Where:	My Documents	
Created:	Fri Mar 12 2021 14:50:44 GMT+05:30 (India Standard Time)	
Modified:	Fri Mar 12 2021 14:50:44 GMT+05:30 (India Standard Time)	
Description:		
Upload Image: Bro	wse	
Open document link:	https://app.bdb.ai/home/#/opendocument?data=eyJ1c2Vyljoi	
	Anyone with the link 🔘 Can view 📄 Can edit	
	Close	5ave

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.

- **b.** Share with User: The story document gets shared with the selected user or users.
 - 1. Select the 'Share with User' tab.
 - 2. Search for a specific user(s) using the search bar.
 - 3. Select a user or multiple users by using the tick marks in the given box(es).
 - 4. Click the 'Save' option.
 - 5. A success message appears, "Document privilege has been updated successfully".

Properties 5	Document privilege has been updated succes:	sfully
Story Properties		Exclude Users
alluallu.Thomas	<u> </u>	3
anaghakn		۵
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."

Properties 5	Document privilege has been updated successfully	×
Story Properties Search	Share with Use 1 Share with Group	Exclude Users >
15 july 2		
AdminPermissionTes	t	3-2
All Permission Group	Test	
Anuj		
Anuj_gupta		
Archanagrp		
bdb		
		Close Save



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

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

- **d.** Exclude Users: The selected user gets excluded from the privilege to access the story document.
 - 1. Select the 'Exclude Users' tab.
 - 2. Search for the specific user via the Search bar.
 - 3. Select a user or users by using checkmark(s) in the given box.
 - 4. Click the 'Save' option.
 - 5. A success message appears, "Document privilege has been updated successfully."

Properties 5	Document privilege has been updated successfully		×
Story Share with User Search	Share with Grout 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."



Properties Document of confirmation	copying process started, P n.	lease check nounicau	
< Share with User	Share with Group	Exclude Users	1 Copy to
Search	۹		2/
alluallu.Thomas			3 🗹
anaghakn			
anil.kumar			
anushree.shinde			
ARC_gmail			Close Sav

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.

	Q		Q)
Last 3 Notifications		Se	ee All	-
admin Copying Document Document copied with title Stor	ry successf	ully!!!		
admin Datastore Notification for sales Failed to load datastore 'salesfo				
admin Datastore Notification for Samp Loaded data to datastore 'Samp			ess	

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

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

7.3.2.1. Report Burst

The Report Burst operation allows the user to share the open document link of a Business Story 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.



Public Documents >				Search Documents Q Se	ort by: Name 🗸 \Xi 🕀
€%%					€ %%
2dec19nlp ~~ 0 views	BDB Finance_feb5	BDB SAMPLES	BDB SAMPLES	BDBTEST1	Open in New Tab
	€	€ 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6			Modify Document Add to Favorites Rename Copy
con 🗖	Copy of Business Story 📈 0 views	nlp_hiring_2dec19 0 views	Public 🗖	Sample Public Folder	Sample Story N

- 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.

Sample Story			
< vith Group	Exclude Users	Copy to	Report Burst
Inactive			
User List			
Add internal or external use	is *		
-	l id and click 'Enter' key to add exte		
Subject Report Burst			
Report Burst	4	Description	
Report Burst			ıly
Schedule	4	Description	lly
Report Burst	4 Weekly	Description	ly
Report Burst Schedule Daily	4 Weekly	Description	ily 6

xi) A success message appears.

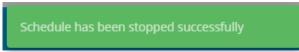


Properties	Updated successfully			×
Sample Story	Exclude Users	Copy to	Report Burst	>
Inactive User List Add internal or external user Administrator S	5 ÷			_
Subject Report Burst	id and click 'Enter' key to add extern	nal email id Description		-
Schedule Daily	day(s)	Monthly		
Every Week Day			Close Save	

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

operties				>
Sample Story				
vith Group	Exclude Users	Copy to	Report	t Burst
Active				
Add internal or external user	5.*			
Administrator 🛞				
Type your correct email Subject	id and click 'Enter' key to add e	xternal email id		
Depart Russe				
Report Burst		Description		
Schedule	Weeki		onthly	
Schedule			onthly	
Schedule Daily	dey(s)		onthly	
Schedule			onthly	
Schedule Daily			Close	Save

xiv) A notification message appears to inform the same.

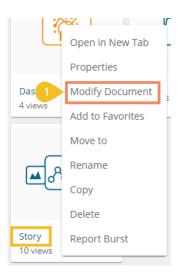




xv) The open doc link of the selected story gets shared to the selected user at the scheduled time through the mail.

7.3.3. 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)
- iv) Click the 'Save' option.

2	Modify Sto	ry ×
3	Name * Story	
	Description	ĥ
		Close Save

v) A confirmation message appears and the chosen information for the story gets modified.

My Documents		5	Story updated	successfu	ılly	_	Search Documents Q	٩		⑦ ₽ ≂ ⊕
					Ē		Search Documents Q	Sort	by: Name V	e e
Shared Documents	Dashboards	•	Data Sheets		Folders		Stories		Story 0 views	~



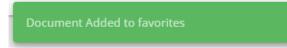
7.3.4. Adding/Removing a Story Document to/from Favorites

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

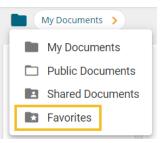
i) Select the 'Add to Favorites' option from the Operations menu.

2	6 X I	IC
0	Open in New Tab	÷
	Properties	
Dashboar	Modify Document	5
4 views	Add to Favorites	
	Move to	
•	Rename	
– 0	Сору	
	Delete	
Story 10 views	Report Burst	

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



iii) Open the 'Favorites' document using the 'My Documents' drop-down menu.



iv) The selected Data Sheet document gets added to the 'Favorites' space.

Favorites >	
€	
Story Arrow Story	Documents

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



Favorit	tes 🗲
* 8	80
	Open in New Tab
<i>c</i> .	Remove from Favorites
Story 2 views	Documents

OR

Navigate to the original Story document and use right-click on it to get the '**Remove from Favorites**' option.

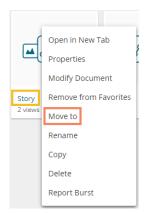
	Open in New Tab
Story 2 views	Properties Modify Document Remove from Favorites
	Move to Rename
	Copy Delete Report Burst

- vi) A confirmation message appears.
- vii) The selected story document gets removed from 'Favorites.'

BBB®	
Favorites >	Document removed from favorites
Documents	

7.3.5. Move to

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





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

Move to		×
My Documents		
Search		
Documents		>
		- 1
	Close	Save

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

Move to	×
← Documents	
Search	
Sample Folder	>
Sample Folder	>
New Folder	>
Folder 5.0	>
	Close Save

vii) A success message appears.

My Documents		Document moved successfully
Shared Documents	Documents	



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



7.3.6. Renaming a Story Document

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

-	Open in New Tab
_ ▲ ,	Properties
	Modify Document
Story	Remove from Favorites
2 views	Move to
	Rename
	Сору
	Delete
	Report Burst

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

Rename	×
1 New Name * Story Document	
	Close 2 Save



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



7.3.7. Copying and Moving a Business Story

The user can copy a business story document and paste it into the selected place on the BDB Platform.

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

-f	Open in New Tab	ţ
_ ™ (Properties	{
	Modify Document	
Story	Remove from Favorites	
2 views	Move to	ł
	Rename	
	Сору	
	Delete	
	Report Burst	

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

ſ



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

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

My Documents >
Create New Folder
Link a URL
Paste
Create New Story

- v) The 'Paste' window appears
 - a. The **'Name'** field displays the 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.



vi) The copied story document gets pasted successfully with a different name in the given space.

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



7.3.8. 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		×
Do you want to delete selected	document	?
	Close	Delete

iv) A success message appears.



v) The selected story document gets removed.

7.3.9. Report Burst

i) Select the '**Report Burst**' option from the Story options menu.

Ē	Open in New Tab
▲ر	Properties
	Modify Document
Story	Remove from Favorites
2 views	Move to
	Rename
	Сору
	Delete
	Report Burst

- ii) The Report Burst window opens.
- iii) Add the users or user groups.
- iv) Provide a subject.
- v) Provide description (optional).
- vi) Schedule the report.
- vii) Click the 'Save' option.



2 Report Burst			×
	William Martin 🔞		
4 Subject Report Burst 6 Schedule	er' key to add external email id 5 Des	scription	
Daily Every 1	Weekly day(s)	Monthly	-
Start time 15	• : <u>54</u> •		
		Clo	ose Save

viii) The open document link and PDF report get shared with the selected user(s)/ user group(s).

Report	¢.
Projectadmin@bdb.ai To: • prakash.joshi@ddbizviz.com	Today at 3:58 PM
Beport Burst.pdf 3 Li & KB ↓ 1.6 KB ↓ Download All	
Hello Prakash,	
Click on the below link to open report	
Reach out to us at support@bdbizviz.com for your queries and suggestions.	
Thank you, Team BDB	

Note:

a. The documents which are created in the '**Public Documents**' space get the '**Delete**' and '**Move To**' operations, the shared documents in this space do not get these two operations.

Pu	ublic Documents >				Se	arch Docume Q Sort by :	Name ~ = 🕀
Ē	Open in New Tab Properties Add to Favorites			Open in New Tab Properties Add to Favorites			€%% ▲
Public	Create New Folder Create New Story Link a URL	Finance_feb5	Public Documents	Create New Folder Create New Story	5 🗖	BDBTEST1	Business Story 1 view
Ē	Rename	1 888		Link a URL Move to Copy			
con	Cop 0 vie	by of Business 📈	testFolder	Rename Delete		Public Documents 📄	Sample Public Fol 🗖



b. The user can get the 'Story' option inside the Apps menu as well.



7.4. Published Dashboard on the BDB Platform

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

- i) The user needs to navigate to the dashboard list provided in a workspace.
- ii) Access the '**Publish to Porta**l' option from the list of Dashboards.

BBB®	Designer							
+ New -	Workspaces (2	\oplus	C	Q	Dashboards (1)			Q
🛋 Manage	All Dashboards				Sample Dashboard	Ţ.	Î	:
🚰 Open 👻	Workspace 1		/	ĩ				
★ Preferences	Workspace			-				
💾 Save as	workspace		·	•				
 Help 	Trash			×				
🖒 Exit								

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

Publish			×
Name	Sample Dashboa	rd	
Description	Published from c	lashboard designer	/
USER LIST	USER GROUPS	EXCLUDE USER	
test			×
ModuleTest ModulePermis	sionTest@bdb.ai		\checkmark
tokentest userwithoutto	ken@bdb.ai		
		Publish	Cancel



vi) Two consecutive messages appear to confirm that the selected Dashboard is published after saving the latest changes.



vii) The user can access the published dashboard from the given location. E.g., the location for the following dashboard is '**My Documents**.'

My Documents >			Sear
		کری کی	
Shared Documents	Documents	Story views	Sample Dashboard 0 views

• Operations Assigned to a Published Dashboard

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

	Open in New Tab
	Properties
	Modify Document
Sample Dashboard	Add to Favorites
6 views	Move to
	Rename
	Сору
	Delete

7.4.1. Open in New Tab

The user can open the selected dashboard in a new tab.

i) Select the '**Open in New Tab**' option from the context menu.



	Open in New Tab		
	Properties		
Sample Dashbo 4 views	Modify Document 1		
- 110/13	Add to Favorites		
	Move to		
	Rename		
	Сору		
	Delete		
	Report Burst		

ii) The concerned dashboard opens in a new tab.

🔓 BDB: Decision Platform 🛛 🗙 🍯	BDB: Decision Platform × +			(A) (
C 🔒 uat.bdb.ai/home//#/	nome/view/313655347/2				@ ☆ €
Apps 🤪 YUJAA: platform 🚷 BDB: De	cision Platf 🍯 BDB: Decision Platf 🍯 B	DB: Decision Platf			
				Q	. III 🗘 🖓
My Documents > Sample Dash	board 🚦				9
Executive Overview Ins	ights			Year	2013 •
Cost per Hire	🔺 Min \$1,350 🔻 Max \$4,80	Top Sources for C	Candidate Recruitment	t	
\$ 2,289			xperience and Joining Status t providing both quality and quar		been found to be the
Q ∠,∠O9	Monthly trend for Cost per hire				
Cost spent per Hire		agency	portal	drive	referral
0.001					
\$ 881 (INR 56,801)	Monthly trend for Cost spent per hire	33% Rev Generated By 174 Hires	21% Rev Generated By 107 Hires	16% Rev Generated By 136 Hires	15% Rev Generated By 76 Hires
Revenue Distribution	QTD YTD	Most In-Demand Skill	Is Salary Distrib	oution	QTD YTD
By Experience By Team	By Designation By Skills	Java 🔺	By Experience	By Team By Desig	nation By Skills
30M		Expected CTC : INR 405	,722 5M		
2-4		Avg Experience : 3.5 year	4M		

7.4.2. Properties

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

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

: *	
	Open in New Tab
Dashboard	Properties
4 views	Modify Document
	Add to Favorites
	Move to
	Rename
	Сору
	Delete
	Report Burst



- iii) The Properties window appears with four options.
 - a. Properties: The basic dashboard properties get displayed.
 - 1. Click the 'Browse' option to upload an image.
 - 2. Click the '**Copy Link**' \Box icon to copy the open document link of the published Dashboard.
 - 3. Click the '**Save**' option to save the update.

Properties	×
Dashboard Properties Sha	re with User Share with Group Exclude Users
Created by:	
-	Governed Dashboard
Version:	6.0.0
	My Documents
	Fri Mar 12 2021 14:58:11 GMT+05:30 (India Standard Time) Fri Mar 12 2021 14:58:11 GMT+05:30 (India Standard Time)
	Published from dashboard designer
Upload Image: Bro	wse
Open document link:	https://app.bdb.ai/home/#/opendocument?data=eyJ1c2VyIjoi
	Close Save

- b. Share with User: The dashboard gets shared with the selected user(s).
 - 1. Select the 'Share with User' option on the Properties window.
 - 2. Search a specific user using the search bar.
 - 3. Select a user or all the users by putting checkmark(s) in the given box(es).
 - 4. Click the 'Save' option.
 - 5. A success message appears stating that the document privilege is updated.

	5				Search Docum
Pr	operties			-	×
	Dashboard				
	Properties 1	Share with User	Share with Group	Exclude Users	1/70
	datapreadmin Automation_Datapre	p_Admin@bdb.ai		3	
				Close	Save



- 6. The dashboard gets shared with the selected user(s).
- c. Share with Group: The dashboard gets shared with the selected group(s).
 - 1. Select the 'Share with Group' on the Properties window
 - 2. Search a specific group by using the search bar.
 - 3. Select a group or all the groups by putting the checkmark(s) in the given box(es).
 - 4. Click the 'Save' option.
 - 5. A success message appears stating that the document privilege is updated.

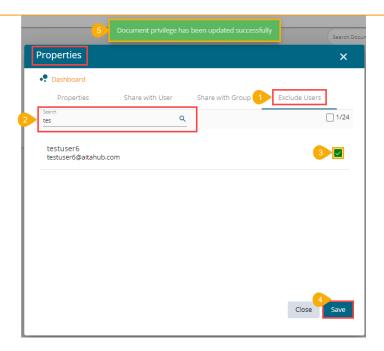
Properties	ument privilege has been upd	lated successfully	×
Pashboard			
< Properties	Share with Us	Share with Group	Exclude >
Search	Q		2/826
15 july 2			
AdminPermissionTes	st		3 🔽
All Permission Group	Test		
Anuj			
Anuj_gupta			
Archanagrp			
bdb			
			Close Save

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

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

- d. Exclude Users: The user gets excluded from the rights to access a dashboard.
 - 1. Select the 'Exclude Users' option on the Properties window.
 - 2. Search a specific user by using the search bar.
 - 3. Select a user or all/multiple the users by putting checkmark(s) in the given box(es).
 - 4. Click the '**Save**' option.
 - 5. A success message appears, and the document privilege gets updated to exclude the selected user(s).





7.4.2.1. Report Burst

The Report Burst operation allows the user to share the open document link of a 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 dashboard and open the context menu with the available operations.
- iii) Click the 'Properties' option.

	Public Documents	>	
	<u>ه</u>		
	2dec19nlp 0 views	~	BDB SAMPLES
			en in New Tab
2	Copy of SF-INVTR 2 views	Mc	operties odify Document d to Favorites
		Rei Co	name py

- iv) The Properties 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 (Optional).
- ix) Schedule the selected story document by configuring the time range.
- x) Click the 'Save' option.



	roperties	×
	Copy of SF-INVTR with User Share with Group Exclude Users Freport Burst	>
•	Active () User List	
6	Type your correct email id and click Enter' key to add external email id	-
9	Report Burst B Description Schedule Image: Control of the second se	1
	Daily Weekiy Monthly	
	Every 1day(s) Every Week Day	
	Close Save	

xi) A success message appears.



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

Properties				×
Copy of SF-INVTR				
vith User Share	with Group	Exclude Users	Report Burst	>
Activ				
Stop Schedule				
testUser 🛞 Test 🔘				
Type your correct email id and cli Subject				_
Report Burst		Description		
Schedule				
Daily	Weekly	Monthly		
Every 1	day(s)			
O Every Week Day				
			Close Save	

xiv) A notification message appears to inform the same.



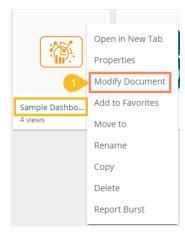
xv) The open doc link of the selected dashboard gets shared to the selected user at the scheduled time through the mail.



7.4.3. Modifying a Dashboard

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

i) Select the 'Modify Document' option from the Dashboard context menu.



- ii) The Modify Dashboard window opens.
- iii) Enter the name for the dashboard.
- iv) Describe the dashboard (optional).
- v) Upload a dashboard file from the local drive via the '**Choose Files**' option. (The dashboard should be in a BVZ file format).
- vi) Provide Dashboard Parameters.
 - a. Click 'Add User Properties' or 'Add System Properties' option to add dashboard parameter(s).
 - **b.** Click the '**Remove**' option to remove the added dashboard parameter.
- vii) Click the 'Save' option.

		Search Documents	Q
	Modify Dashboard	×	t I
2	Name * Sample Dashboard	3 Description Published from dashboard designer	11
	Select Dashboard Choose Files	No file chosen	
100	+ Add User Properties	+ Add System Properties	
9	Parameter Name	Parameter Value	
	Parameter Name	Select System Properties 🔻	
		Close 6 Save	
1			

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

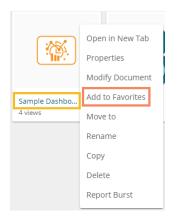


Dashboard has been updated successfully						
My Documents >						
			₩ 688	₽₿		
Shared Documents	Documents		Story 0 views	~	Sample Dashboard 0 views	•••

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

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

i) Select the 'Add to Favorites' operation from the Dashboard context menu.



ii) A pop-up window appears with a message, "Document added to Favorites"



iii) The selected dashboard gets added to the '**Favorites**' section.

Favorites >	
Dashboard 0 views	Documents

- iv) Open the 'Favorites' section.
- v) Use right-click on the dashboard to get the remove option.
- vi) Click the 'Remove from Favorite' option.



>
Open in New Tab
Remove from Favorites

OR

Navigate to the original Dashboard. Use right-click on the dashboard to get the remove option. Click the '**Remove from Favorites**' option.

مناطق	
	Open in New Tab
Uest	Properties
Dashbaard	Modify Document
Dashboard 0 views	Remove from Favorites
	Move to
	Rename
	Сору
	Delete
	Report Burst

- vii) A message appears to notify the removal of the dashboard from the Favorites.
- viii) The dashboard gets removed from the **Favorites.**

S B B O	
Favorites >	Document removed from favorites
Documents 🗖	



7.4.5. Moving a Dashboard

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

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

<u> </u>	Open in New Tab
	Properties
	Modify Document
Dashboard 4 views	Add to Favorites
	Move to
	Rename
	Сору
	Delete
	Report Burst

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

	Move to		×
	My Documents		
	Search		
	Documents		>
•			
			_
			_
		Close	Save
			_

- vi) The user gets redirected to the next screen where the selected folder appears on the top.
- vii) Click the 'Save' option.

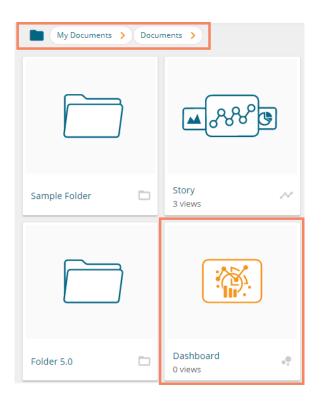


Move to	×
← Documents	
Search	
Sample Folder	>
Sample Folder	>
New Folder	>
Folder 5.0	>
Close	Save

viii) A success message appears.



ix) The dashboard gets moved to the selected space.





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

7.4.6. Renaming a Dashboard

The Administrator can change the name of an existing dashboard.

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

	Open in New Tab
	Properties
	Modify Document
Sample Dashbo	Add to Favorites
4 views	Move to
	Rename
	Сору
	Delete
	Report Burst

- ii) The Rename window opens.
- iii) Enter a new name for the dashboard.
- iv) Click the 'Save' option.

		.) <u>-</u>
Rename		×
New Name *		
Dashboard		
	Close	Save

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

My Documents >		Document renamed suc	ccessfully
Shared Documents	Dashboard 0 views	Dashboards 🗖	Data Sheets 🗖



7.4.7. Copying and Moving a Dashboard

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

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

	Open in New Tab
	Properties
_	Modify Document
Dashboard 4 views	Add to Favorites
	Move to
	Rename
	Сору
	Delete
	Report Burst

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

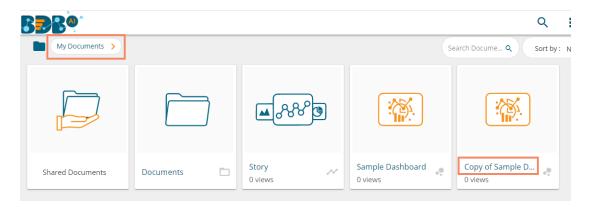
My Documents >				Se	arch Docume Q	Sort by :	Name 🗸	
			Open in New Tab Properties Add to Favorites Create New Folder				C	
Shared Documents	Dashboard 0 views	Dashboards	Create New Story Link a URL Move to Copy		Folders		Stories	
	Paste Create New Story		Paste Rename Delete					

- vii) The Paste window opens.
- viii) The dashboard name displays the prefix '**Copy of-**' before the original name of the dashboard (E.g., *Dashboard* gets a new name *Copy of Dashboard*).
- ix) Click the 'Save' option.

Paste	×
Name * Copy of Dashboard	
	Close Save



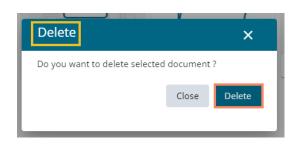
x) The selected dashboard gets copied with a different name.



7.4.8. Deleting a Dashboard

Administrators can remove a dashboard by following the given steps:

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



v) A success message appears.



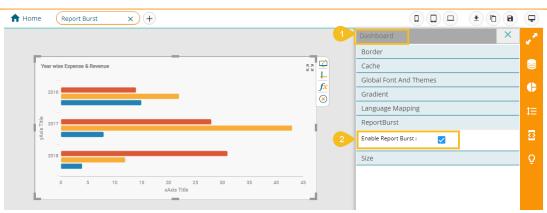
vi) The selected dashboard gets deleted.

7.4.9. Report Burst

This feature helps to notify the selected users or user groups with the open link and PDF report of the selected dashboard.

- i) Open the Dashboard Properties for a selected dashboard.
- ii) The Report Burst option comes enabled by default.





iii) Select the 'Publish' icon for the dashboard.

BBB®	Designer								
+ New -	Workspaces (3)	Ð	C	Q	Dashboards (15)				Q
🚔 Manage	All Dashboards				Report Burst	3 (†)	•	ŧ	:
🗁 Open 👻	Finance		1	î	Text Analyzer	(f)	•	ĩ	:
★ Preferences	Workspace1			-	Untitled Dashboard	(F)	0		:
H Save as			·	-				-	<u> </u>
? Help	Campaign Analytics		1	Î	Sample Dashboard		4	Î	
🕐 Exit	Trash			Ø	Snap shots	F	٥	Î	÷

- iv) Select specific users/ user groups to whom the dashboard needs to be published.
- v) Publish the dashboard to the selected users by clicking the '**Publish**' option.

Publish			×
Name	Report Burst		
Description	Published from d	ashboard designer	/i
USER LIST	USER GROUPS	EXCLUDE USER	
testu			×
migTestUser testRestscript@			
migTestUser testRestscript@			
testUser testUser@bdb.	ai	4	
		5 Publish	Cancel

- vi) The published dashboard gets added to the selected user account.
- vii) Select the 'Report Burst' option from the options menu.



BBB®						
My Documents >					Search Documents	٩
	BBRO				Open in New Tab	
Shared Documents	Copy of Sample 0 views	Folders	New Folder	Published Dash	Report Burst Properties	2
୶ୄୄୄୄୄୄୄୄୄୄୄୄ	€ ~~~~				Add to Favorites Move to Rename Copy	
Story N 22 views	Story N 10 views				Delete	

- viii) The Report Burst window opens.
- ix) Add the users or user groups.
- x) Provide a subject.
- xi) Provide description (optional).
- xii) Schedule the report.
- xiii) Click the 'Save' option.

8 Report Burst			Search Docume
Active () User List Add Internal or external users * Prakash Joshi 📀	William Martin 😵		
Subject 10 Report 12 Schedule	ster' key to add external email id	cription	
Daily € Every 1 € Every Week Day	day(s)	Monthly	-
Starttime 15	▼: 57 ▼	Ch	ose Save

xiv) The open document link and PDF report get shared with the selected user(s)/ user group(s).

Report	-Ò-
· projectadmin@bdb.ai	Today at 3:58 PM
To: • prakash.joshi@bdbizviz.com	
Download All O Preview All	
Hello Prakash,	
Hello Prakash, Click on the below link to open report	
Hello Prakash, Click on the below link to open report <u>click here</u>	
Hello Prakash, Click on the below link to open report	



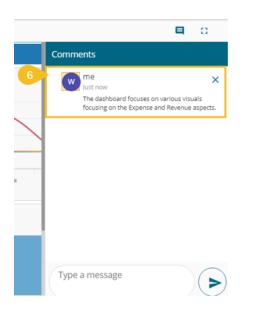
7.4.9.1. Insert Comments

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

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

My Documents > Filter Saver Dashboard		2 💷 ።
	3>	Comments
Year wise Expense & Revenue	Revenue across continents in a decade	
	6,000 4000 2,000 Calfornia Ca	
11 STV/C	San Jose San Jose San Jose 12 12 45.778 45.7 29251551 29127284	Type a message 5

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



Note:

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

7.5. Published Forms on the BDB Platform

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



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

Forms			• Connected
÷	Sample For	n 🖊	
	Page 1	Save Questions +	: ^
	Ouestion Select your gender option 1 Male option 2 Female	Select Answer Type Checkbox Display Name Field Identifier* Select your gende 15_Selecty	₽:
	+ Add option + Add other option with input		
		Save Questions +	:

Or

Click the Publish option using the Form Options menu.

Sample Form	:	
	1	Edit
	Î	Delete
		Duplicate
	0	Preview
1	6	Publish
	٥	Settings

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



iv) A success message appears to confirm the action of the publish.



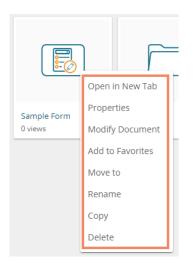
v) The Published form appears under the 'My Documents' place of the same BDB Platform account.

www.bdb.ai



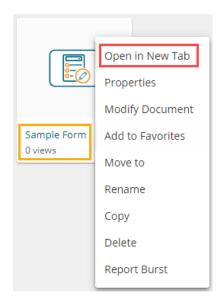
BBR [®]				c	R III 🛱 🛛 🕑
My Documents >				Search Documents Q Sor	rt by: Name 🗸 \Xi 🕀
Shared Documents	Dashboards	Data Sheet Sample	Data Sheets 🗖	Folders	Sample Form O views

- vi) Each published Form is credited with some operations on the BDB Platform.
- vii) The users can use right-click to access the available Form operations in a context menu.



7.5.1. Open in New Tab

i) Select the 'Open in New Tab' option using the Form operations menu.



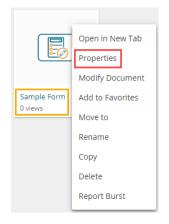
ii) The concerned form opens in a new tab.



b 808: Decision Platform x b 808: Decision Platform x +	_ 0 ×
← → C ■ uat.bdb.ai/home//#/home/view/437551141/22	९ ☆ 🔒 :
🚻 Apps 🥡 YUJAA: platform 🚳 BDB: Decision Platf 🐞 BDB: Decision Platf	
BBBO A H	: 🗘 🖓 🕑
My Documents > Sample Form	■ 0
Page 1	=~
	8
Form Instruction X	
Hello Mr. Vijay	
Go to form	

7.5.2. Properties

i) Select the '**Properties**' option from the operations menu.



- ii) The 'Properties' window appears with four options:
 - a. Properties: Displays basic details about the Form creation.
 - i. Click the 'Browse' option to upload an image.
 - ii. Click the 'Save' option to save the update.

Properties		×
Sample Form		
Properties Sha	re with User Share with Group Exclude U	Isers
Created by:	Adminuser	
Туре:	Form	
Version:	6.0.0	
Where:	My Documents	
Created:	Fri Mar 12 2021 16:10:59 GMT+05:30 (India Standard Tir	me)
Modified:	Fri Mar 12 2021 16:11:01 GMT+05:30 (India Standard Tir	me)
Description:		
Upload Image: Bro	wse	
	Clos	se Save



iii. A message appears to assure the image update.



iv. The selected image gets updated on the form.



- b. Share with User: The Form gets shared with the selected User
 - i. Select the 'Share with User' option using the Properties window.
 - ii. Search a specific user by using the search bar.
 - iii. Select a user or multiple users by putting checkmark(s) in the given box(es)
 - iv. Click the 'Save' option.
 - v. A success message appears stating that the document privilege is updated.

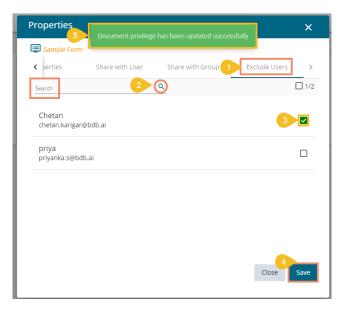
Properties 5 Document privilege has been updated successfully	×
Sample Form	
Properties Share with User Share with Group	Exclude >
Search tes	1/13
testRestscriptois testRestscript@bdb.aienn	3
testRestscriptwcp testRestscript@bdb.aijtd	
	Close Save

- vi. The Form gets shared with the selected user(s).
- c. Share with Group: The Form gets shared with the selected User Group
 - i. Select the 'Share with Group' option using the Properties window.
 - ii. Search a specific group by using the search bar.
 - iii. Select a user group or multiple user groups by putting checkmarks in the given box(es).
 - iv. Click the 'Save' option.
 - v. A success message appears stating that the document privilege is updated.



Properties	cument privilege has been	updated successfully	×
Search de	Share with User	Share with Group	Exclude >
Demo			
Demo Role			
Demo Viewers			
Designer			
		_	
			Close Save

- vi. The Form gets shared with the selected user group(s).
- d. Exclude the User: The Selected User gets excluded from the rights to access the Form
 - i. Select the **'Exclude User'** option using the Properties window.
 - ii. Search for a specific user(s) using the search bar.
 - iii. Select a user or multiple users by putting the checkmark(s) in the given box(es).
 - iv. Click the 'Save' option.
 - v. A success message appears, and the document privilege gets updated to exclude the selected users.



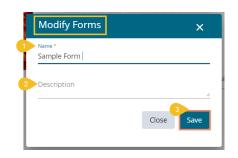
7.5.3. Modifying a Form

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



	Open in New Tab
E C	Properties
	Modify Document
Sample Form	Add to Favorites
0 views	Move to
	Rename
	Сору
	Delete
	Report Burst

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



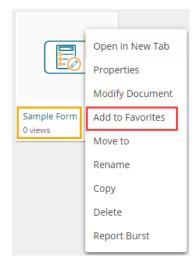
iv) A success message appears.



v) The selected information gets modified.

7.5.4. Adding a Form to Favorite

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





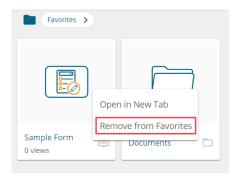
ii) A message appears to assure the success of the action.



- iii) Open the Favorites section.
- iv) The selected Form gets added to the Favorites.

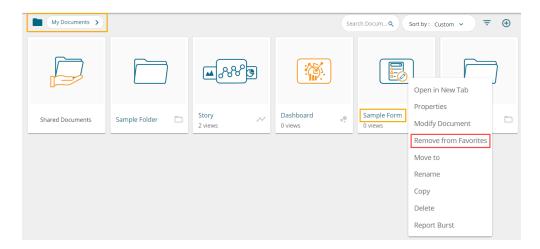


v) Navigate to the Favorite space and use the right-click on the Form to get the '**Remove from Favorites**' option.



OR

Navigate to the original Form and use right-click on the Form to get the '**Remove from** Favorites' option.





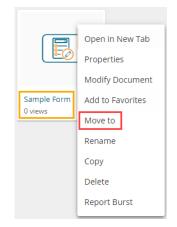
- vi) Click the 'Remove from Favorites' option.
- vii) The Form gets removed from the Favorites, and a notification message appears stating the same.

BBB®	
Favorites >	Document removed from favorites
Documents	

7.5.5. Moving a Form

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

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



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



Move to	×
My Documents	
Search	
Data Sheets	>
Dashboards	>
Stories	>
Folders	>
	Close Save

- vi) The user gets redirected to the next screen.
- vii) Click the 'Save' option.

Move to	×
← Folders	
Search	
Miscellaneous	>
ODC Recruitment-2017	>
All Data	>
Logistic	>
Insurance Solution	>
Linto C	lose Save

viii) A success message appears.

My Documents >			Document m	noved succ	essfully		Search Documents	Q Q Sort by
]]				
Shared Documents	Dashboards		Data Sheets		Folders	•	Stories	



ix) The Form gets moved to the selected space.



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

7.5.6. Renaming a Form

i) Select the 'Rename' option from the Form Operation menu.

Open in New Tab
Properties
Modify Document
Add to Favorites
Move to
Rename
Сору
Delete
Report Burst

- ii) A new window opens prompting to rename the Form.
- iii) Provide a New Name for the selected form.
- iv) Click the 'Save' option.



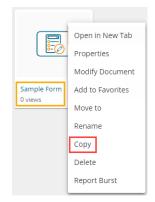
v) The selected form gets renamed.



BBB®				۹		¢	? P
My Documents >		Document renamed su	ccessfully	arch Docume Q Sort b	y: Name	• •	.
				BBRQ			
Shared Documents	Dashboards 🛅	Data Sheets 🛅	Folders	Sample Form 1	Stor	ries	

7.5.7. Copying a Form

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



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

BBR [®]					Q	₩ Å	0 P
My Documents >				Search Docume Q	Sort by :	Name 🗸	÷ 🕀
			Ē	Open in New Tab Properties Add to Favorites Create New Folder	R ^A	Ē	
Shared Documents	Dashboards 🗖	Data Sheets	Folders	Create New Story Porm		Stories	-
				Link a URL			
	Create New	Folder		Move to			
	Link a URL			Сору			
	Paste			Paste			
	Create New	Story		Rename			
				Delete			

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



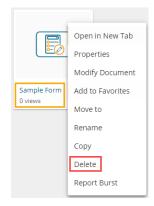
Paste		×
_{Name} * Copy of Sample Form		
	Close	Save

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

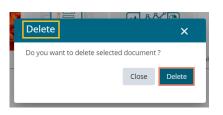


7.5.8. Deleting a Form

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



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



iv) The selected form gets deleted.

7.5.9. Report Burst

i) Select the 'Report Burst' option from the Form options menu.



Open in New Tab
Properties
Modify Document
Add to Favorites
Move to
Rename
Сору
Delete
Report Burst

- ii) The Report Burst window opens.
- iii) Add the users or user groups.
- iv) Provide a subject.
- v) Provide description (optional).
- vi) Schedule the report.
- vii) Click the 'Save' option.

Report Burst			×
● Active () User List			
Add internal or external users *			
Prakash Joshi 😣			
Type your correct email id and click T Subject Report Burst	nter' key to add external email id	Description	
Schedule			
Daily	Weekly	Monthly	
Every 1	day(s)		
Every Week Day			
Start time 16	• : 34 •		
			Close Save

viii) A success message appears.

BBB®			
My Documents >			
Shared Documents	Sample Data S 2 views	Folder	



ix) The open document link and PDF report get shared with the selected user(s)/ user group(s).

Hello Prakash,	
Click on the below link to open report click here	
Reach out to us at <u>support@bdbizviz.com</u>	for your queries and suggestions.
Thank you, Team BDB	

Note: Steps to Stop the Scheduled Report Burst

1. The Inactive button gets changed into the Active button after the report bursts details get saved.

Report Burst			×
Inactive User List			
Add internal or external users *			
Prakash Joshi 😣			
Type your correct email id and click 'Entr Subject Report Burst	er' key to add external email id	ption	
Schedule			
Daily	Weekly	Monthly	
Every 1	day(s)		
Every Week Day			
Start time 16 🔹	: 06 💌		
		Close	Save

- 2. Click the Active button.
- 3. Click the 'Save' option.



Report Burst		×
● Active () User List		
Add internal or external users *		
Prakash Joshi 😒		-
Type your correct email id and click 'Enter' key to add external emai Subject		
Report Burst	Description	
Schedule		
Daily Weekly	/ Monthly	
Every 1day(s)		
O Every Week Day		
Start time 16 💌 : 34	·	
	Close S	ave

4. A success message appears to inform the user that the schedule has been stopped.

			Schedule has been stopped successfully
My Documents >			
Shared Documents	Sample Data S 2 views	Folder	

7.5.9.1. Insert Comments

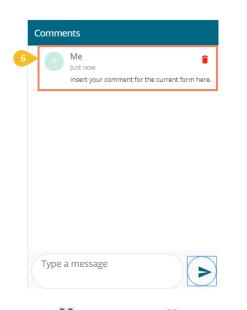
The comment option is provided for the published Forms to explain or insert feedback for the form.

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



My Documents > Sample Form			2 🔲 🛙
Page 1		3	Comments
•		8	
	Submit		
		4	Type a message 5

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



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

7.6. Published Data Sheets on the BDB Platform

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

i) Click the 'Publish' icon for the selected Data Sheet.

■ Data Center					New
🚮 Home	Search Data-Sheet Meta Data		Showing 40 out of 40		
Data Connectors	Sample Data Sheet				ĩ
Data Sets	NameSheet	ED.	•	/	1
💩 Data Stores	Data Sheet ConnectorCheck	F	0	1	Î
Data Store Meta Data	slowness	(f)	0	1	Î
Data Sheets	sheet_slowness	F	0	1	Î

- ii) The Publish Data Sheet window opens.
- iii) Select a user(s) by using the USER/ USER GROUP(s) tab.
- iv) Click the 'Save' option.



Publish Data	a Sheet		×
Name	Sample Data Sheet		
USER LIST	USER GROUPS	EXCLUDE USER	
Search			
Adminuser admin.user@bdb	.ai		
Sidharth sidharth.p@bdb.	ai		
testuser6 testuser6@aitaht	ub.com		
		Cancel	Save

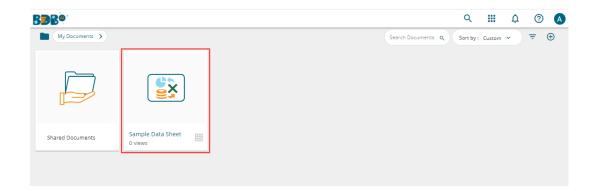
v) A success message appears to inform that the dashboard has been saved.



vi) Another success message appears to inform that the datasheet has been updated successfully.



vii) The Data Sheet gets published under the My Documents space of the selected user.



viii) Click the 'Publish' icon for the selected Data Sheet.

😑 Data Center				New
Home	Search Data-Sheet Meta Data	\$	howing 40	out of 40
Data Connectors	Sample Data Sheet			ĩ
Data Sets	NameSheet			-
💩 Data Stores	Data Sheet ConnectorCheck	a	> /	Î
Data Store Meta Data	slowness	F	> /	
ප්රී Data Sheets	sheet_slowness	n (> /	Ĩ

- ix) The Publish Data Sheet window opens.
- x) Select a user(s) by using the USER/ USER GROUP(s) tab.
- xi) Click the 'Save' option.



Publish Data	a Sheet		×
Name	Sample Data Sheet		
USER LIST	USER GROUPS	EXCLUDE USER	
Adminuser admin.user@bdb	.ai		
Sidharth sidharth.p@bdb.a	ai		
testuser6 testuser6@aitahu	ıb.com		
		Cancel	Save

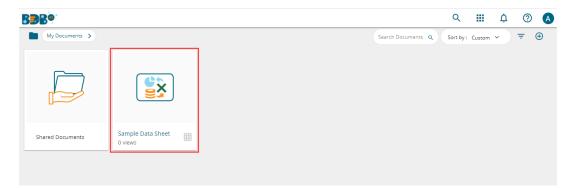
xii) A success message appears to inform that the dashboard has been saved.



xiii) Another success message appears to inform that the datasheet has been updated successfully.



xiv) The Data Sheet gets published under the My Documents space of the selected user.



A published Data Sheet gets credited with some options by default. The user can access the list of these options by using a right-click on a published Data Sheet.

- xv) Select a published Data Sheet from the My Documents.
- xvi) Use the right click to get the options context menu.



BBB®		
My Documents >		
		Open in New Tab Properties
Shared Documents	Sample Data Sheet 2 views	Modify Document Add to Favorites
		Move to
		Rename
		Сору
		Delete
		Report Burst

7.6.1. Open (the Published Data Sheet) in New Tab

- i) Select the '**Open in New Tab**' option.
- ii) The Data Sheet opens in a new tab.

Bø.							Q	☆ 🗯	• \varTheta
						Q			0
My Documents >	Sample Data Sheet	1						•	i 0
First row : 0	# of rows : 100	G =		FF F				ÎF.	_

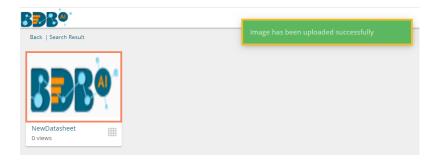
7.6.2. Properties

- i) Click the '**Properties**' option.
- ii) The Properties window opens with four options.
 - a. Properties: Displays the basic properties and open document link of the selected Data Sheet.
 - 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. Click the 'Save' option to save the updated properties of the selected Data Sheet.



Properties			×
🗰 Sample Data Sheet			
Properties Sha	re with User	Share with Group	Exclude Users
Created by:	Adminuser		
Туре:			
Version:	6.0.0		
Where:	My Documents		
Created:	Tue Mar 09 202	I 17:56:13 GMT+05:30 (In	idia Standard Time)
Modified:	Tue Mar 09 202	I 17:56:13 GMT+05:30 (In	idia Standard Time)
Description:	Published from	Data Center	
Upload Image: Bro	wse		
Open document link:	https://app.bdb.a	ii/home/#/opendocumer	nt?data=eyJ1c2VyIjoi
			Close Save

Note: The user gets a success message when the image gets updated on the selected Data Sheet. The selected image gets uploaded on the Data Sheet.



- **b.** Share with User: The Data Sheet 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".



5	Document privilege has		Search D
Properties			×
Sample Data Sheet			
Properties 1	Share with User	Share with Group	Exclude Users
2 Search per	۹		2/70
performance_prod perf@bdb.ai			3 🗹
permission permissiontest@bdb			\checkmark
			Close Save

- 6. The Data Sheet gets shared with the selected user(s).
- c. Share with Group: The Data Sheet gets shared with the selected user group or groups.
 - 1. Select the 'Share with Group' tab.
 - 2. Search for a specific user(s) using the search bar.
 - 3. Select a group or groups 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".

5	Document privilege has been updated successfully	Search Doc
Properties		×
🔠 Sample Data Sheet		
Properties	Share with User Share with Group	Exclude Users
Search de	٩	1/86
Demo		3
Demo Role		
Demo Viewers		
Designer		
		Close Save
		close Save



- 6. The Data Sheet gets shared with the selected user group(s).
- **d.** Exclude User: The selected user or users get excluded from the privileges to access the Data Sheet.
 - 1. Select the 'Exclude Users' tab.
 - 2. Search for a specific user(s) using the search bar.
 - 3. Select a group or groups 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".

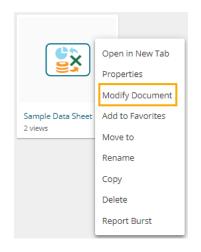
				Search Docur
	Properties			×
Г	🔛 Sample Data Sheet			
	Properties	Share with User	Share with Group	Exclude Users
2	Search te	۹		1/4
	testuser6 testuser6@aitahub.co	m		3
				4
				Close Save
L				

6. The selected user(s) get excluded from the privileges to access the Data Sheet.

7.6.3. Modify Document

The user can modify the Data Sheet information by using this option.

i) Select a 'Modify Document' option for a published Data Sheet.





- ii) The Modify Document Dialog window opens.
 - a. Modify the Data Sheet Name.
 - b. Modify the Data Sheet Description.
 - c. Click the 'Save' option.

Modify Datasheet		×
Name * Sample Data Sheet		
Description Published from Data Center		1,
	Close	Save

iii) A success message appears.

.		
My Documents >		.Datasheet updated successf
Shared Documents	Sample Data Sheet	

iv) The Data Sheet details gets modified.

7.6.4. Add to Favorites

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

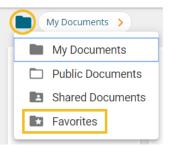
	Open in New Tab
	Properties
	Modify Document
Sample Data Sheet 2 views	Add to Favorites
2 views	Move to
	Rename
	Сору
	Delete
	Report Burst

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

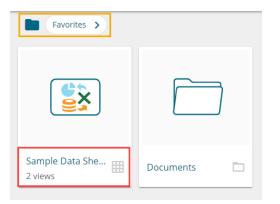


My Documents		Document Added to fav	orites
Shared Documents	Sample Data She 2 views	Sample Folder	BDB Overview © views

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



iv) The selected Data Sheet document gets added to the 'Favorites' space.



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

Favorites >		
Sample Data She. 2 views	Open in New Tab Remove from Favorites	

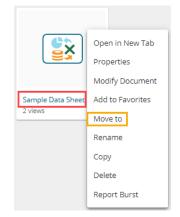
- vi) A success message appears stating that the document got removed from the Favorites space.
- vii) The selected Data Sheet gets removed from 'Favorites.'



BBB®	
Favorites >	Document removed from favorites
Documents 🗖	

7.6.5. Move to

i) Click the '**Move to'** option from the operation context menu.



- ii) The Move to window opens.
- iii) Select a folder where you wish to move the Data Sheet.
- iv) Click the 'Move' icon to move the Data Sheet.

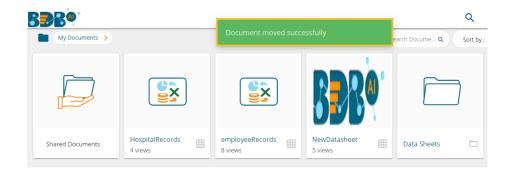
	×
	>
Close	
	Close

- v) The next screen opens displaying the selected folder at the top.
- vi) Click the 'Save' option.

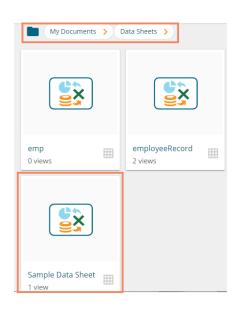


Move to		×
← Data Sheets		
Search		
datasheet		>
		6
	Close	Save

vii) A success message appears.



viii) The concerned Data Sheet gets moved to the selected folder.



7.6.6. Rename

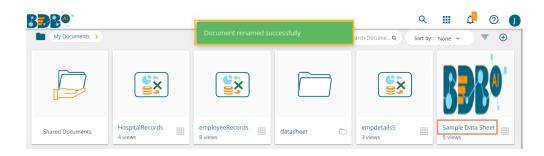
- i) Click the 'Rename' option from the Operations context menu.
- ii) The Rename window opens.



- iii) Provide a New Name for the Data Sheet.
- iv) Click the 'Save' option.

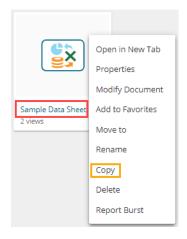


- v) A success message appears.
- vi) The Data Sheet gets renamed.



7.6.7. Copy

i) Click the '**Copy**' option from the Operations context menu.



ii) Select a folder and use the right click to access the Paste option. Or

Use right click at the blank space of 'My Documents' or 'Public Documents'.

iii) Click the '**Paste**' option.



BBB®			Q	III 🖧 🛛 🚺
My Documents	>)		Search Docume Q Sort by	None ~ = 🕀
		Open in New Tab Properties Add to Favorites Create New Folder	BBRO	
Shared Documents	employeeRecords 10 views	datasheet Create New Story etails5	NewDatasheet 7 views	Data Sheets 🗖
	Create New Folder Link a URL Paste Create New Story	Link a URL Move to Copy Paste Rename Delete		

- iv) The Paste window opens.
- v) The Data Sheet name appears with '**Copy of**-'prefix. E.g., *NewDatasheet* gets a name *Copy of NewDatasheet* for the copied Data Sheet.
- vi) Click the 'Save' option.

Paste		×
Name * Copy of NewDatasheet		
	Close	Save

vii) The copied Data Sheet gets pasted to the selected space.

BBB®					९ 🏢 🖞 🛛 🌒
My Documents >				Search Documents Q	Sort by: None 👻 \Xi 🕀
				B R	
Shared Documents	employeeRecords	datasheet 🗖	empdetails5 3 views	NewDatasheet 7 views	Data Sheets
	BBR O'				
MobileDetails 3 views	Copy of NewDatasheet	Jmob Data sheets			

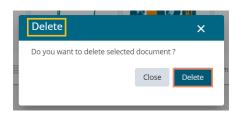
7.6.8. Delete

i) Click the '**Delete**' option from the Context menu.

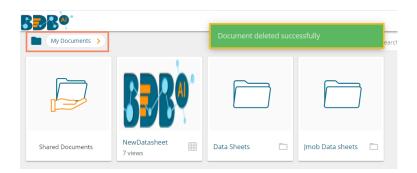


	Open in New Tab
	Properties
	Modify Document
Sample Data Sheet	Add to Favorites
2 views	Move to
	Rename
	Сору
	Delete
	Report Burst

- ii) The Delete window opens to confirm the action of deletion.
- iii) Click the 'Delete' option.



iv) A success message appears, and the selected Data Sheet gets removed.



7.6.9. Report Burst

x) Select the '**Report Burst**' option from the Data Sheet options menu.

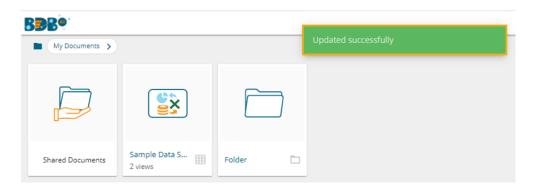
	Open in New Tab
	Properties
	Modify Document
Sample Data Sheet	Add to Favorites
2 views	Move to
	Rename
	Сору
	Delete
	Report Burst



- xi) The Report Burst window opens.
- xii) Add the users or user groups.
- xiii) Provide a subject.
- xiv) Provide description (optional).
- xv) Schedule the report.
- xvi) Click the 'Save' option.

Report Burst		×
Active () User List Add Internal or external users *		
Prakash Joshi 💿		
Type your correct email id and click 'Enter' key to add external email id Subject Report Burst	Description	
Schedule		
Daily Weekly	Monthly	1
Every 1 day(s)		
O Every Week Day		
Start time 16 💌 : 34 💌		
	Close	Save

xvii) A success message appears.



xviii) The open document link and PDF report get shared with the selected user(s)/ user group(s).

Hello Prakash,	
Click on the below link to open report	
click here	
Reach out to us at <u>support@bdbizviz.com</u> f	for your queries and suggestions.
Thank you,	
Team BDB	



Note: To Stop the Scheduled Report Burst

5. The Inactive button gets changed into the Active button after the report bursts details get saved.

Report Burst					×
Inactive User List					
Add internal or external users +					
Prakash Joshi 🔞					
Type your correct email id and click 'End Subject Report Burst	ter' key to add external email id	Description			
Schedule					
Daily	Weekly		Monthly		- I
Every 1	day(s)				
O Every Week Day					
Start time 16	: 06 🔹				
				Close	Save

- 6. Click the Active button.
- 7. Click the '**Save**' option.

Report Burst			×
● Active () User List			
Add internal or external users *			
Prakash Joshi 🛛 😣			
Type your correct email id and click "Enter' k Subject Report Burst		iption	
Schedule			
Daily	Weekly	Monthly	
Every 1d	ay(s)		
O Every Week Day			
Start time 16 💌 :	34 💌		
		Close	Save

8. A success message appears to inform the user that the schedule has been stopped.

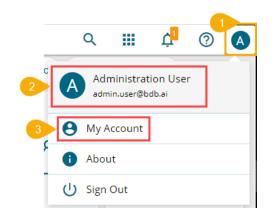


BBB®				
My Documents >			Schedule has been stopped successfully	
Shared Documents	Sample Data S 2 views	Folder 🛅		

8. My Account

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

- i) Click the User Profile icon from the Platform homepage.
- ii) Details of the logged-in user display below.
- iii) Click the '**My Account**' option.



iv) A notification message appears, and the user profile gets loaded.

BBB®		Q	 ¢	?	A
■ My Account	User profile has been loaded				
Profile	Email admin.user@bdb.ai Full name *		 		
★ Preferences	Administration User		 		
Configuration	Mobile number		 		
	Landline number				
	Address			//	
	Update				



8.1. Profile

The Profile tab displays personal information about the logged-in user.

- i) The Profile tab opens by default displaying the following fields:
 - Email (not editable)
 - Full Name
 - Mobile Number
 - Land Number
 - Address
- ii) The user can modify/change the required details and click the '**Update**' option.

BBB®		Q	 ¢2	0	P
🗮 My Account					
Profile Password Preferences Configuration	Email pa-dl@bdb.ai Full name * pa-dl Mobile number 9190000009 Landline number				
2	BB02256114 Address India 		 	<i>li</i>	

iii) The profile changes get saved.

8.2. Password

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

- i) Click the 'Password' tab using the My Account page.
- ii) The Change Password window opens.
- iii) Enter the 'Old Password,' 'New Password,' and Confirm Password' (the newly set password).
- iv) Click the '**Update**' option.

≡	My Account		
:	Profile 2	Change Password	
Ô	Password	Enter 6-16 characters. Do not include common words or names. Combine uppercase letters, lowercase letters, numbers, and symbols.	
*	Preferences	Old password *	1
۵	Configuration	New password *	L
	3	Strong Confirm new password *	
	4	Update	

v) The password gets changed.



8.3. Preferences

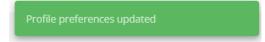
The Administrator can change the preference settings of the users using this module from the left side of the pane.

Follow the below given steps to change preference settings

- i) Click the 'Preferences' tab using the My Account menu row.
- ii) The right-side panel displays the option to set the preferred view for the user homepage.
- iii) Select an option using the 'Select Preference' drop-down option. The following choices will get displayed:
 - a. Folder- the user can set any folder as the preferred view for the homepage.
 - b. Document- the user can set any document as the preferred view for the homepage.
 - c. Shared- the user can set any document from the Shared folder as the preferred view for the homepage.
 - d. Default it opens the My Documents page for the user as the default homepage.
- iv) As per the selected choice, a drop-down menu appears (E.g., The following image displays all the available folders since the '**Folder**' option is selected from the Select Preference drop-down).
- v) Select a specific folder/document from the below displayed choices by using a tick mark in the given radio button.
- vi) Click the 'Save' option.

BBB®		Q	¢ <mark>4</mark>	?	N
■ My Account					
2 Profile	Choose any option to set as your preferred view for your home page				
Password	Select Preference Folder		6		
1 🛨 Preferences	Search			Q	
Configuration			 		
•	O 🖿 BDB SAMPLES				L
	🔿 🛅 Dashboard				
	O 🗖 Arch_RB				н
	5 🕑 🖿 Sample Folder				ł.

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



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

8.4. Configuration

The configuration tab allows the user to create or reset the API Token and set the Password Expiry configuration.



≡ My Account		
Profile	API Token Configuration	Password Expiry Configuration
Password	No token available, Click on the icon to generate	Password never expires
★ Preferences	-	Password last changed on: 24 Jan 2020, 09:16 AM
Configuration	8	8

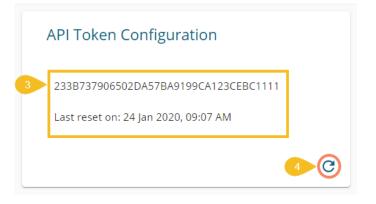
a. API Token Configuration

The API Token is used to expose the document as an open document.

- i) Navigate to the API Token Configuration option using the 'Configuration' tab.
- ii) Click the 'Generate' icon to generate an API token.

≡ My Account	
L Profile	API Token Configuration
Password	No token available, Click on the icon to generate
★ Preferences	
Configuration	2B

- iii) The API token gets generated and displayed below with the mention of the last reset date and time.
- iv) Click the 'Reset' icon to reset the API Token.



- v) The '**Reset Token Confirmation**' window opens with a warning that while resetting the API token the old open doc dashboards would become invalid.
- vi) Click 'YES' from the warning message window to reset the API Token.



vii) A success message appears to inform that the API token has been reset.

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Note: The last reset date and time get mentioned under the API Token Configuration window.

b. Password Expiry Configuration

The password expiry limit can be configured via this option.

i. Navigate to the 'Password Expiry Configuration' option using the 'Configuration' tab.



- ii. Select the 'Password Never Expires' option by putting a tick mark in the given box.
- iii. Click the 'Apply Changes' icon to save the changes.

Password Expiry Configuration
2 Password never expires ✓
Password last changed on: 26 Nov 2019, 05:00 AM
3

iv. A success message appears to confirm the update and the selected configuration gets saved.



Note: By selecting the '**Yes**' option via the password expiry configuration section, the password never expires for the user.

9. Securing Platform: Authentication

The BDB Platform is provided with some authentication features to keep it secure all the time.



9.1. Enterprise

Enterprise authentication is the default authentication method for the BDB platform; it is automatically enabled when you first install the system - it cannot be disabled. The BDB platform maintains user and group-specific information within its database while adding or managing users and groups. Use the system default Enterprise authentication if you prefer to create distinct accounts and groups for use with the BDB platform, or if you have not already set up a hierarchy of users and groups in a third-party directory server. You do not have to configure or enable Enterprise authentication. However, users can opt for another authentication option to meet their organization's security requirements.

9.2. Windows AD

The Windows AD security enables you to map user accounts and groups from your AD suser database to the platform. It also allows the system to verify all logged on requests that specify AD Authentication. Users are authenticated against the AD user database and have their membership in a mapped AD group verified before the platform grants them an active session. You can use the plug-in to configure updates for the imported AD groups.

9.3. Clarity

Security in CA Clarity PPM has two aspects: i) securing the application and, ii) securing its data. The security mechanism and control are the same for both.

- a. Securing the Application: It verifies that the correct users have access to the appropriate application functionality. This type of clarity security controls user access and capabilities.
 E.g., An administrator gets more rights than an end-user.
- **b.** Securing the Application Data: It verifies that resources have access only to the assigned data.

E.g., everybody should be able to see the platform page, but with their assigned projects and functionalities.

Note: The User can configure the AD or CA PPM authentication options through the Administration module.

10. Signing Out

The following steps describe how to log out from the BDB Platform.

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

Q		¢	?	
	ministrat iin.user@b	tion Use odb.ai	r	
e My A	ccount			
i Abou	ut			
U Sign	Out			

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



Note:

- a. Clicking on the 'Sign Out' option redirects the user back to the 'Login' page of the BDB platform.
- b. Click the 'About' option to open the Platform welcome page.

