Admin Guide

Platform R-6.0

Contents

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

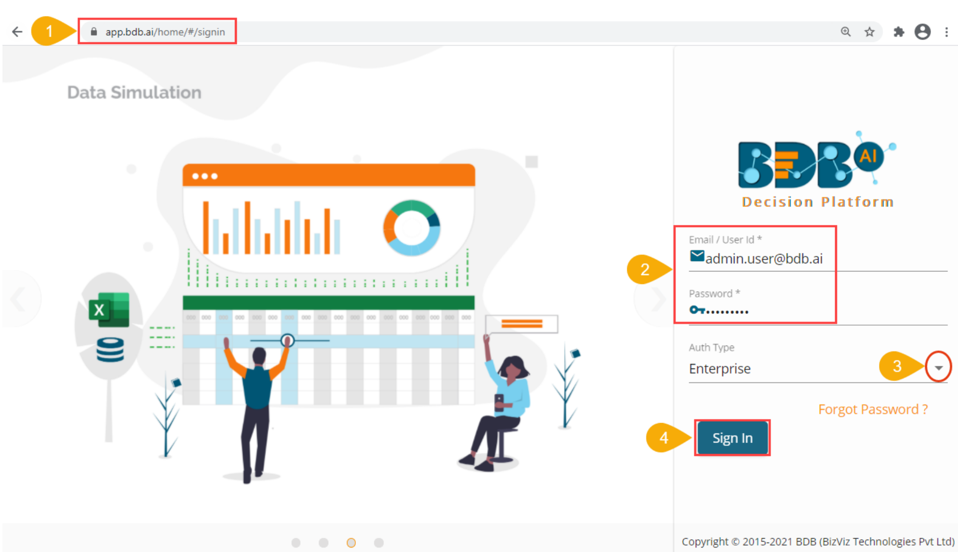
The BDB Platform is a web browser-based application. The users can run the BDB Platform and its various plugins on the below given versions of the browsers:

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

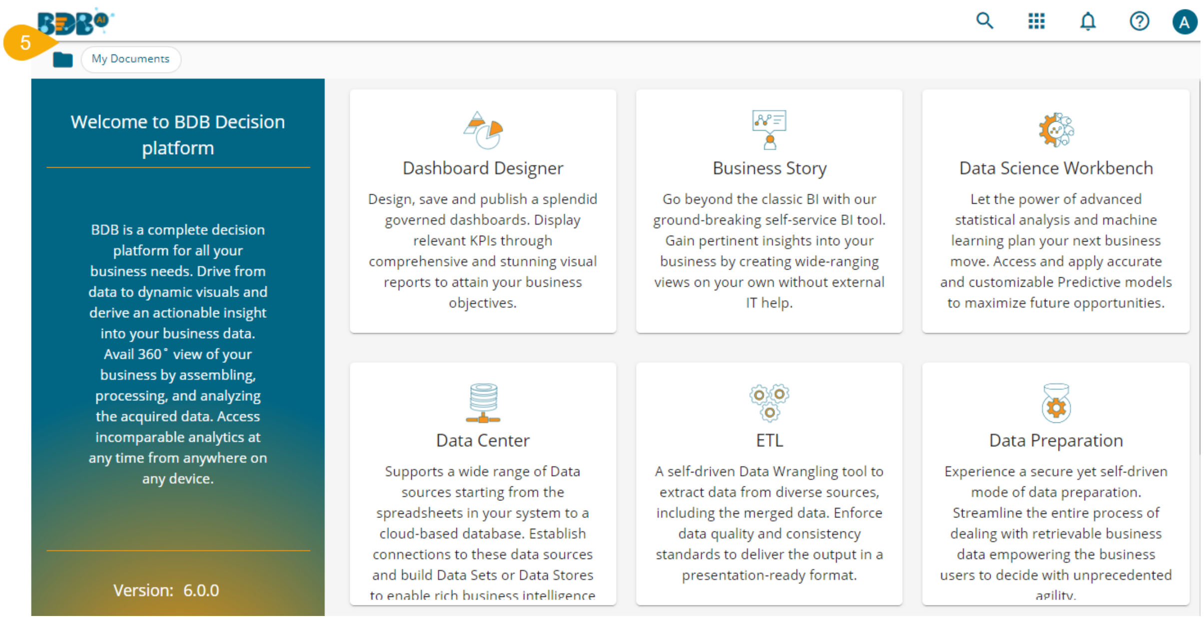
3. Getting Started with the BDB Platform

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.

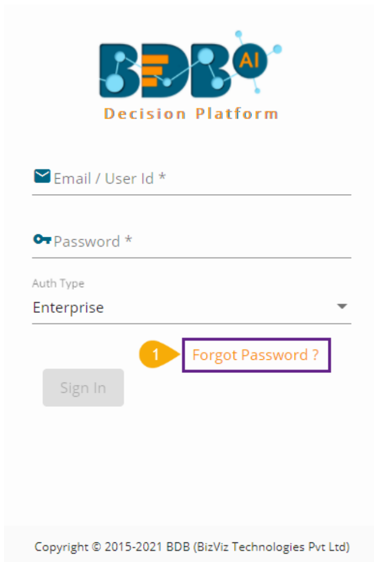


Note: The above screen opens only for those newly created users who have not yet created any document using the BDB Platform.

3.1. Forgot Password Option

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

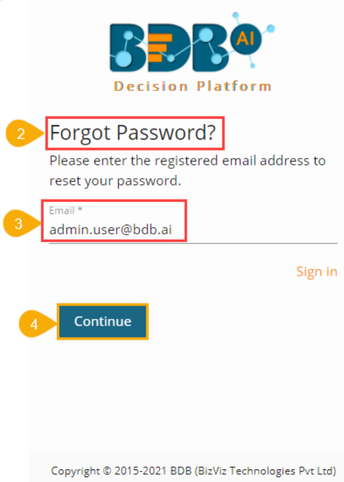
i) Click the '**Forgot Password?**' option from the Sign In page.



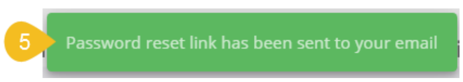
ii) The '**Forgot Password?**' page opens.

iii) Provide the email id that is registered with BDB to send the reset password link.

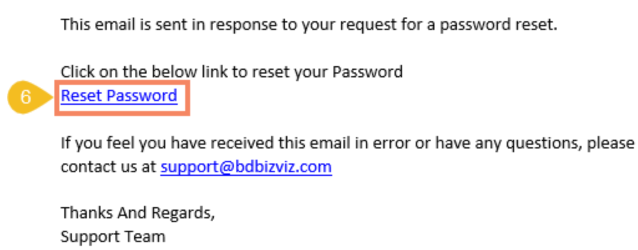
iv) Click the '**Continue**' option.



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.)

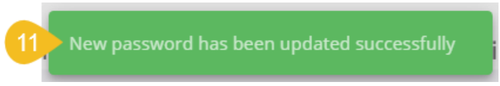


vi) Click the link from your registered email.



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.

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



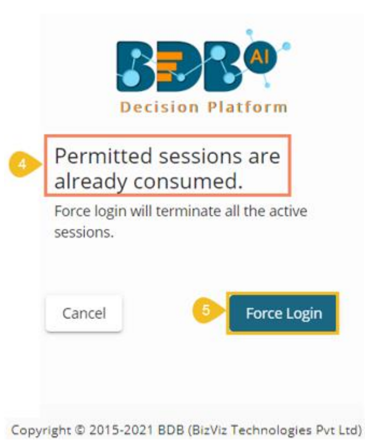
Note: The user gets redirected back to the Sign In page after successfully resetting the password.

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.



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

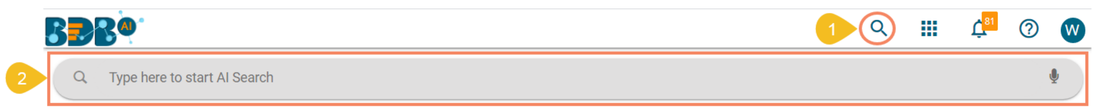
The BDB Platform homepage redirects the user to access various applications and features within the platform. It also displays information about a user and the documents accessible to the user.

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.



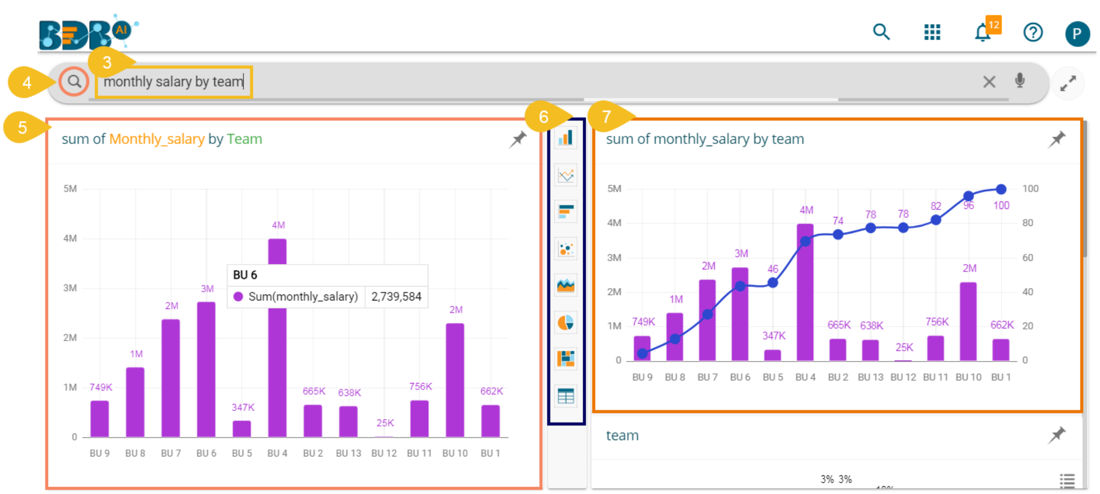
iii) Type a specific data query in the given search space.

iv) Click the ‘**Search**’ icon provided on the Search space or click the ‘**Enter**’ key.

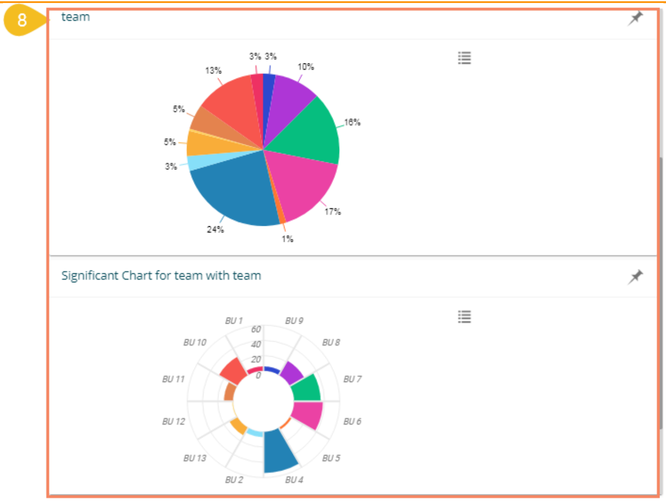
v) The searched data query result appears in the form of a View on the screen.

vi) The user can visualize the same data using any of the given charting options.

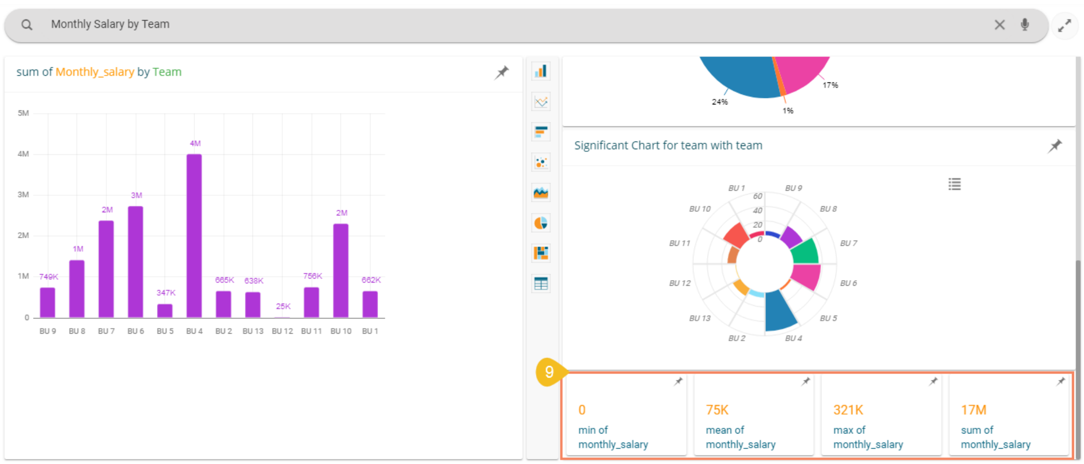
vii) The right side of the screen displays searched query in a default display choosing another charting category. (E.g., Mixed chart in this case).



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.

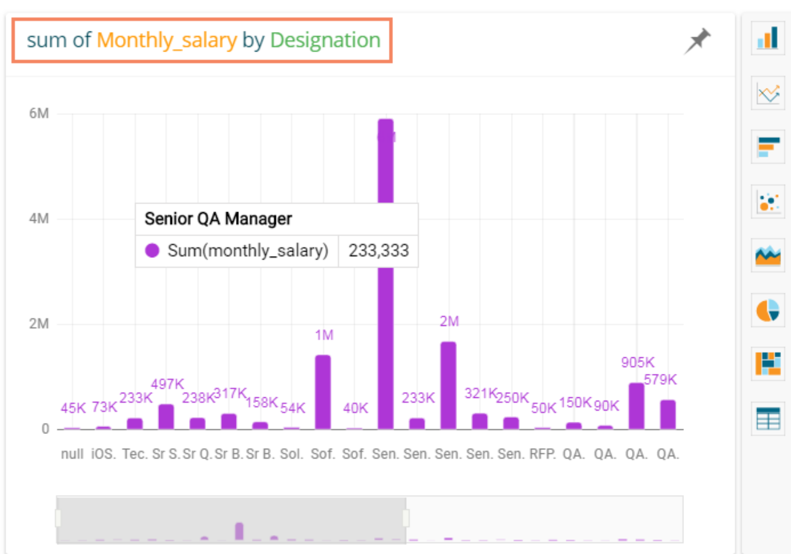


3.3.1.1. Data Drill Using AI Search

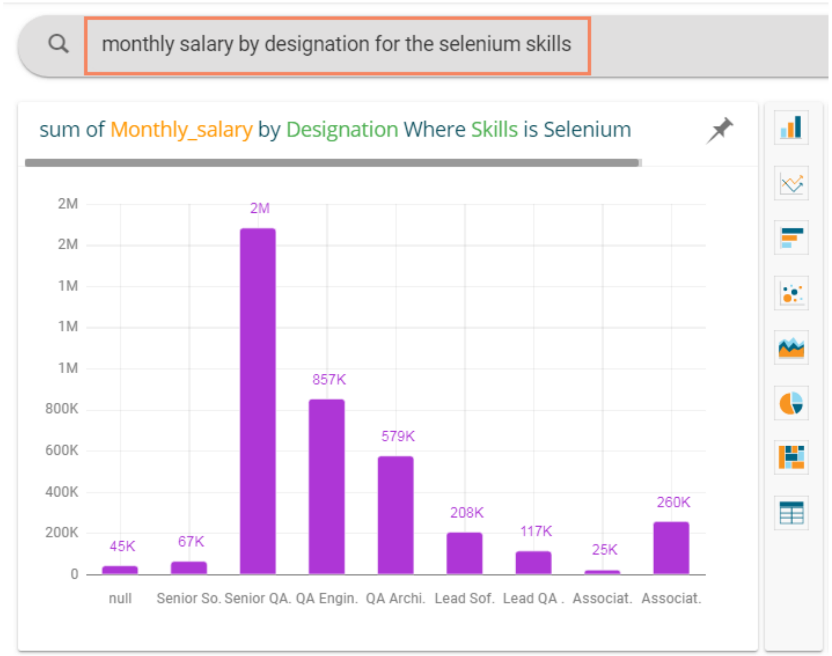
The user can search for data up to any granularity level.

E.g., The following images display data up to the deeper granularity level.

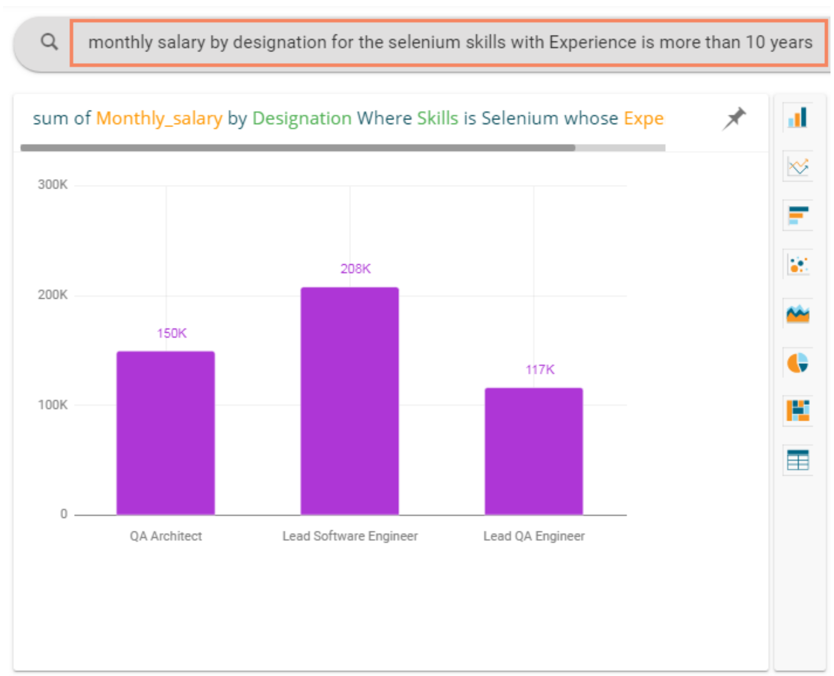
Query 1: Sum of the monthly salary by Designation



Query 2:monthly salary by designation for the selenium skills



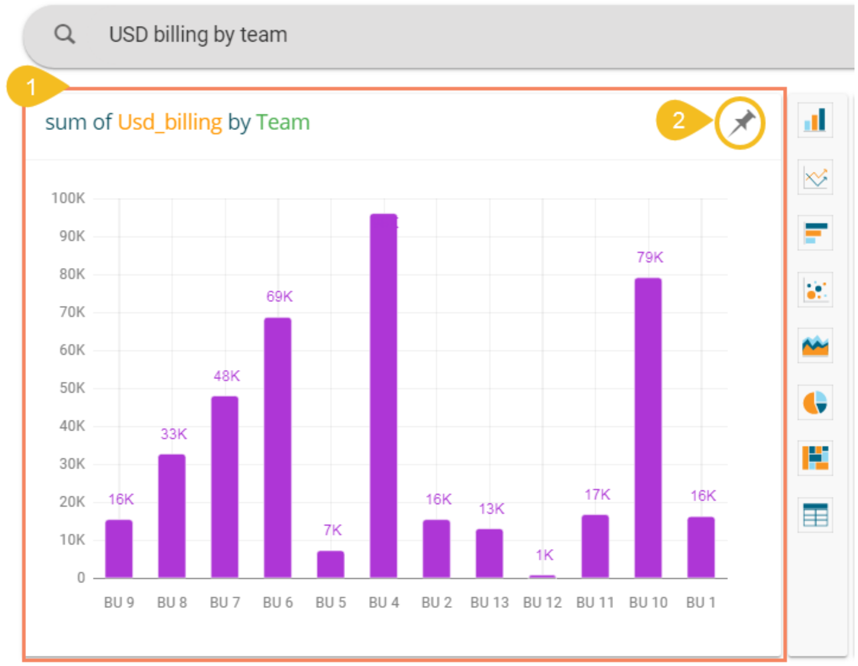
Query 3: monthly salary by designation for the selenium skills with Experience is more than 10 years



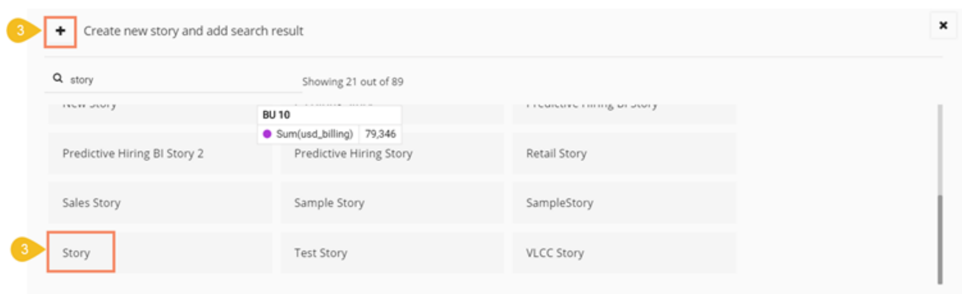
3.3.1.2. Adding a Searched View to a Story

i) Navigate to a searched view.

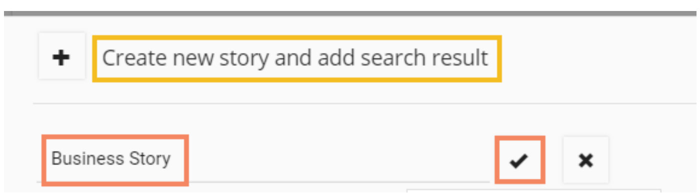
ii) Click the ‘**Add to Story**’ icon from the Searched view.



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

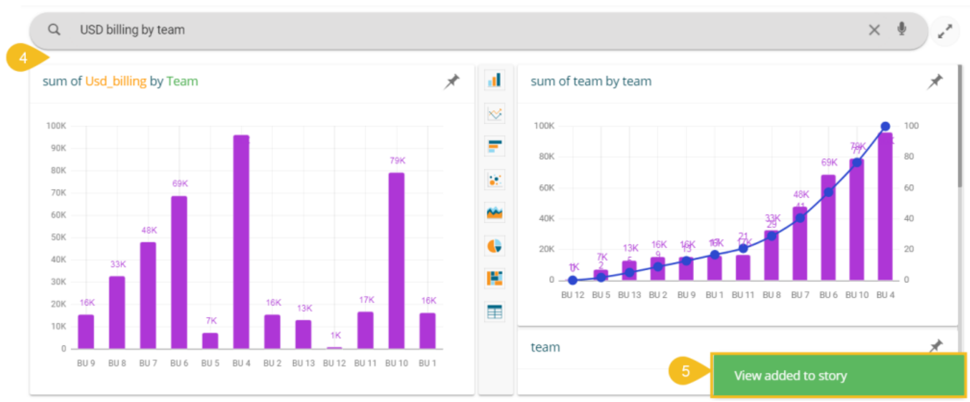


a. Create a new Story to add the Searched View: If this option is selected the user needs to provide a title for the new story and click on the 'Create' icon as displayed below.



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.

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.



Note:

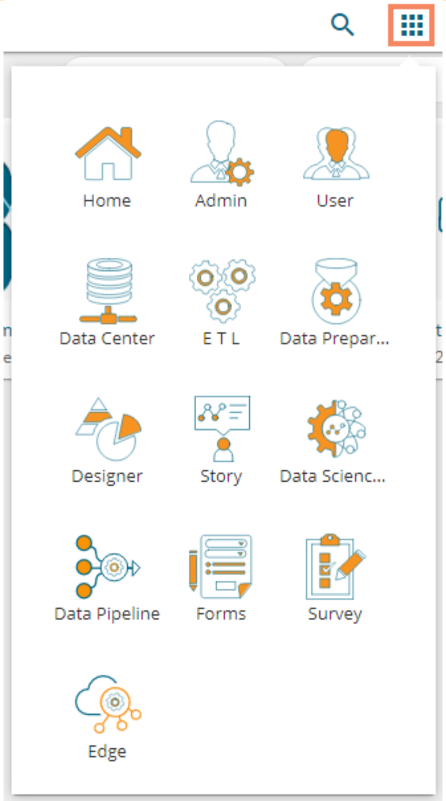
a. The user can access a voice-based search by clicking the '**Search by voice**' icon.

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**' icon.
iii) All the available plugin applications get displayed.

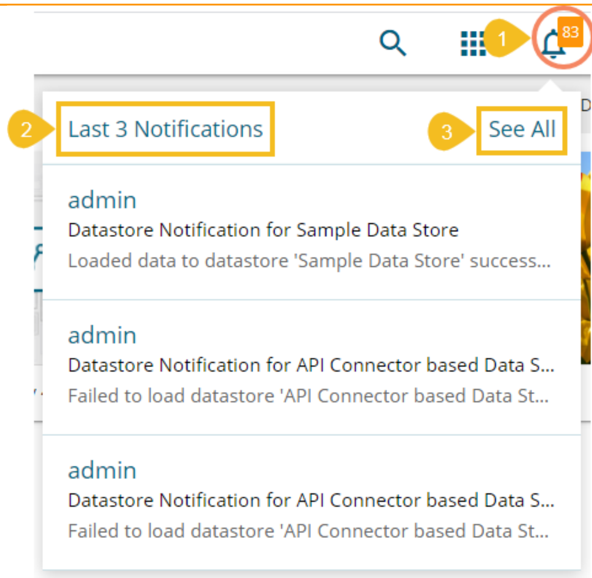


Note: The user can select and open various applications by using the specific App icon provided under the '**Apps**' menu window.

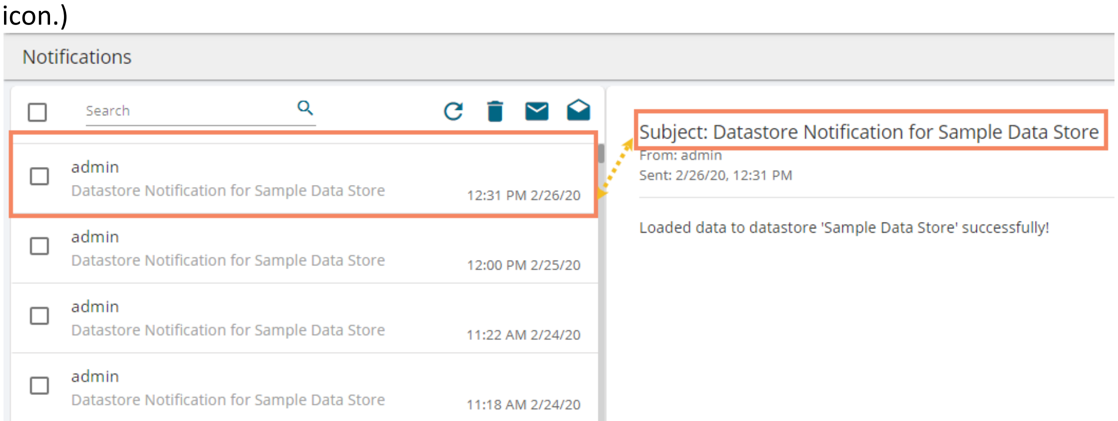
3.3.3. Notification Option

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**' 83 option using the Platform homepage header.
ii) A window opens with the latest 3 notifications.
iii) Click the '**See All**' option.



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



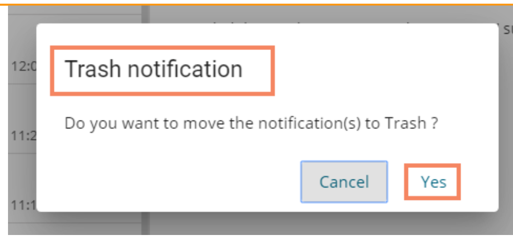
Icons provided on the inbox window:

Icons	Name	Task Assigned
	Trash	Displays messages in a list of all the deleted messages
	Refresh	Receives the latest messages
	Delete	Moves the selected messages to the Trash folder
	Mark unread	Marks messages status as '**unread**'
	Mark read	Marks messages status as '**read**'

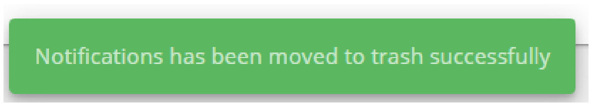
v) Click the 'Delete' icon from the header panel of the notification inbox.

vi) A message window appears to confirm the action of moving the selected notification to Trash.

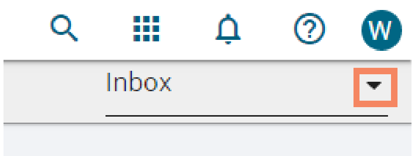
vii) Click the '**Yes**' option to move the notification(s) to Trash.



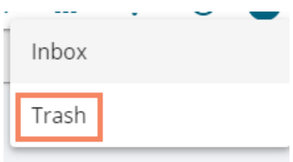
viii) A message appears to confirm that the selected notification(s) has been moved to the Trash folder.



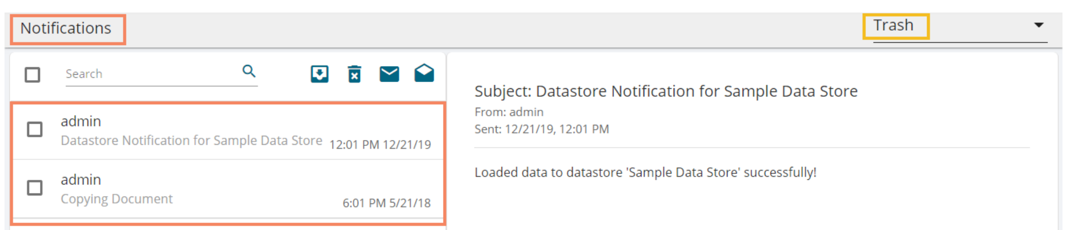
ix) Click the drop-down option to get the '**Trash**' option.



x) Click the 'Trash' option.



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



Icons provided on the Trash-box window:

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

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

a. Moving messages from inbox to trash

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

3.3.4. Help Menu

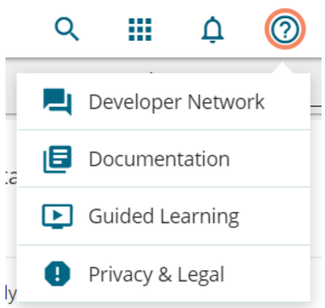
The users can access the Documentation section using the Help documents via this menu.

i) Navigate to the Platform homepage.

ii) Click the ‘**Help’** icon from the header panel.

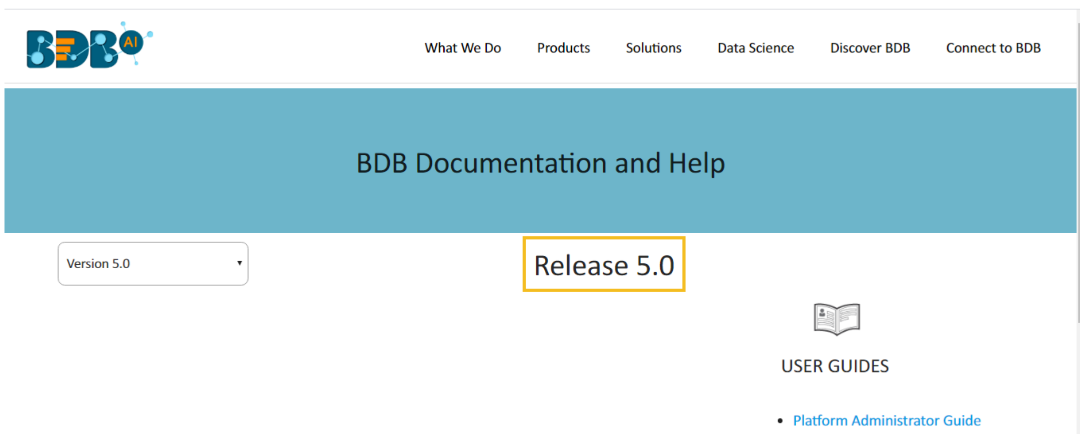
iii) A context menu opens with the following options:

1. Developer Network
2. Documentation
3. Guided Learning
4. Privacy & Legal



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.



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.

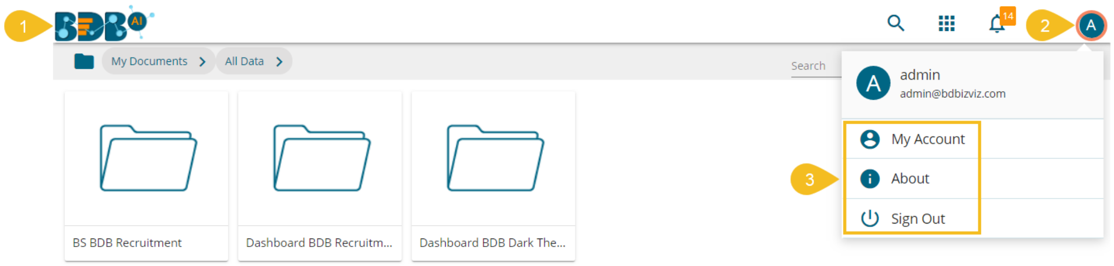
ii) Click the '**User Profile**' option.

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

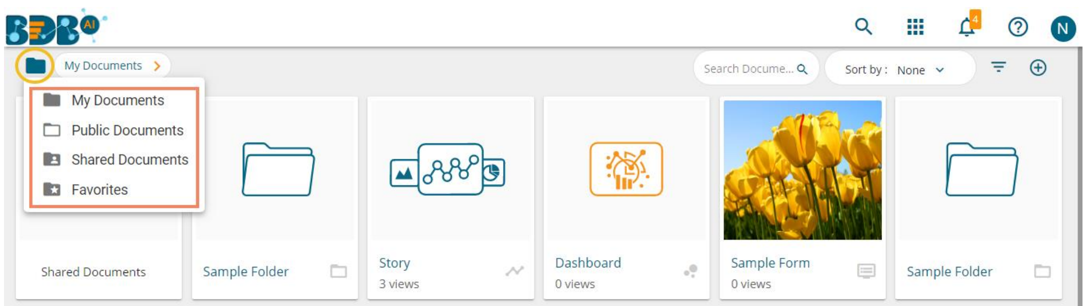


Note: '**My Account**' and '**Sign Out**' options are explained under topic no.8 and 10 of this document. Please refer to the suggested topics to get more information on these options.

3.3.6. Available Documents

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

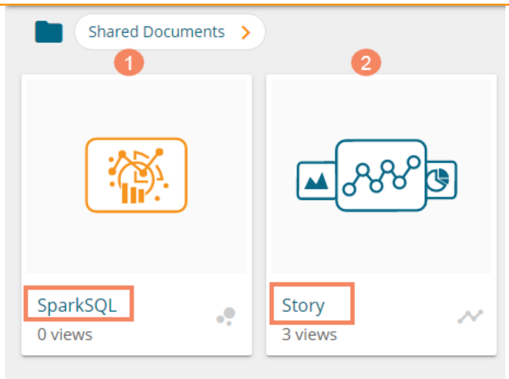
1. My Documents
2. Public Documents
3. Shared Documents
4. Favorites



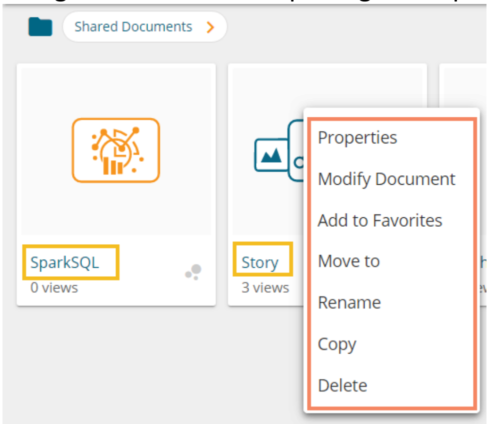
- **My Documents**
  - '**My Documents**' lists all the documents created by the user or assigned to the user
  - The documents are displayed as thumbnails

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

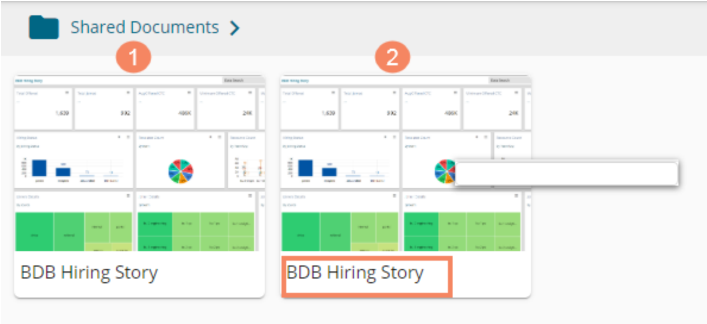
- **Shared Documents**
  - The documents shared by users can be part of the '**Shared Documents**'
  - The users receive a view-only copy of the documents which are shared using the '**Share With**' option.
  - The documents shared via the '**Copy To**' option contains all the edit permissions for the users. E.g., In the below given image, a dashboard titled **SparkSQL** is shared using the '**Share With'** option and a Business Story named **Story** is shared using the '**Copy To**' option.



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.



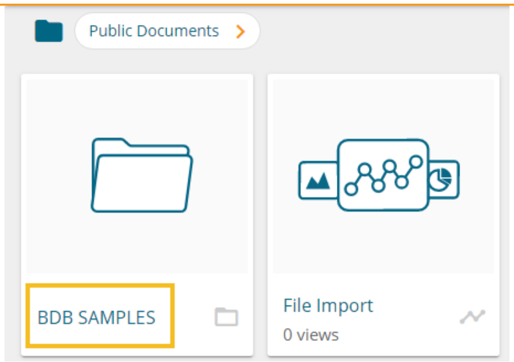
The Dashboard shared using the '**Share With**' option gets view-only permission.



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

Note:

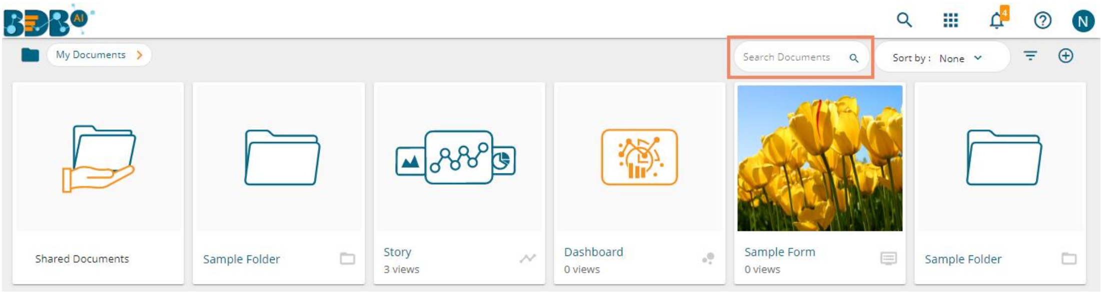
a. The '**My Documents**' space opens by default while opening the BDB Platform homepage.
b. The Public Documents contain a sample folder by default.



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.

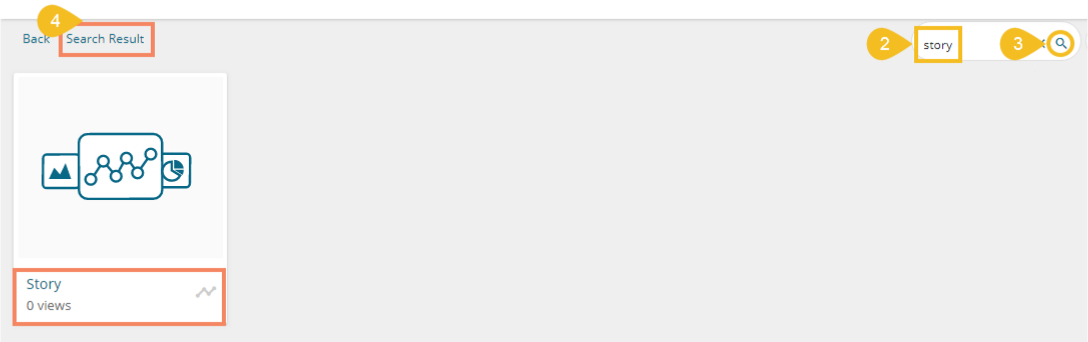


ii) Insert the title of the document you want to search in the given space.

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:



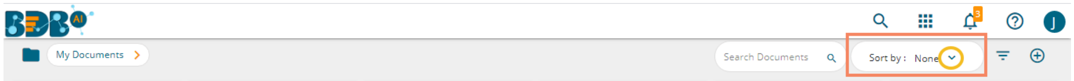
3.3.8. Sorting Documents

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:

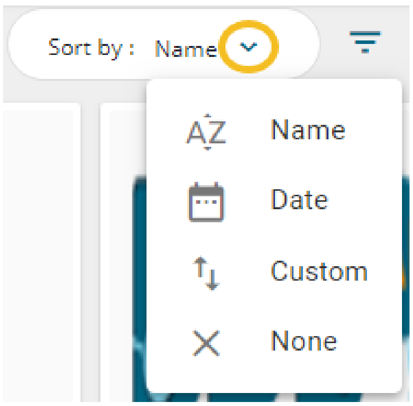
1. **Alphabetical/Name (Ascending and Descending)**
2. **Date (Ascending and Descending)**
3. **Custom**

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



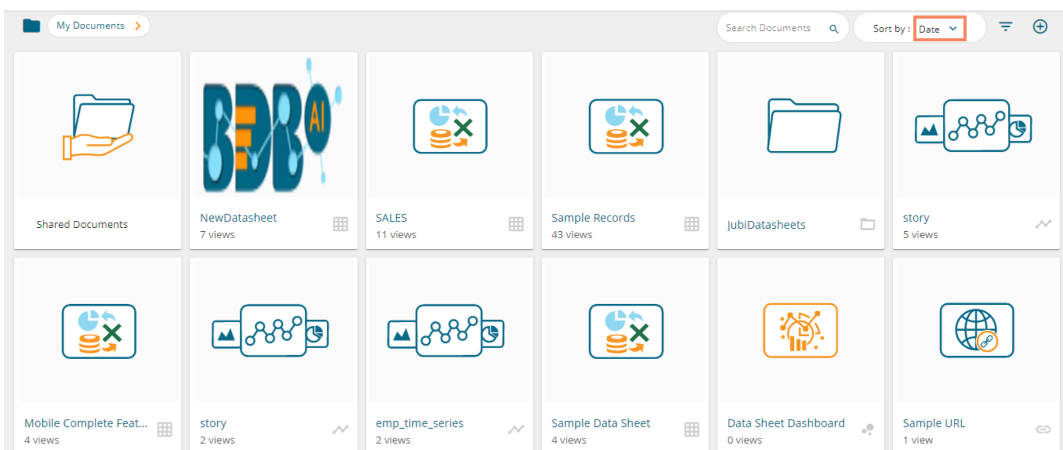
ii) A context menu opens with the following sorting options:

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.

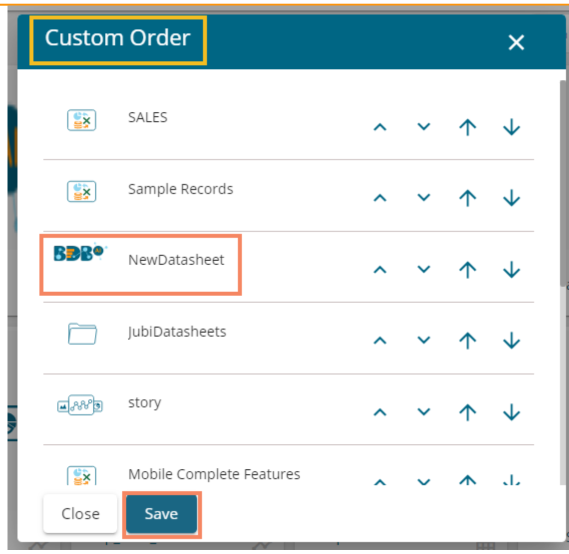


v) The user can set a customized order of the document by choosing the '**Custom**' order option.

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.



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

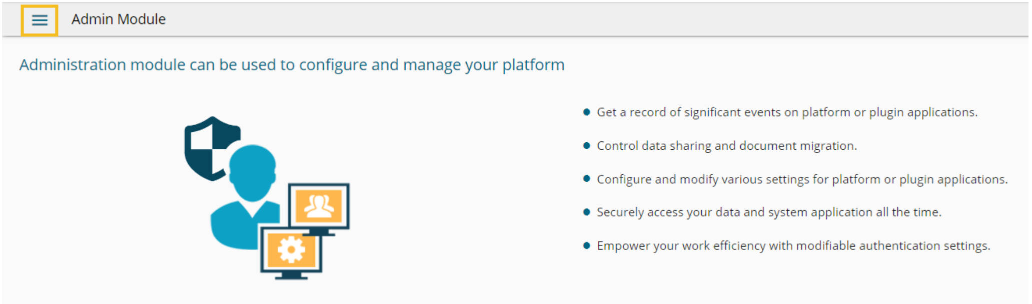
The Administrator manages the entire BDB Platform through this module. It controls all the general and user-specific configuration settings for various plugin applications provided on the platform.

4.1. Accessing the Administration Module

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

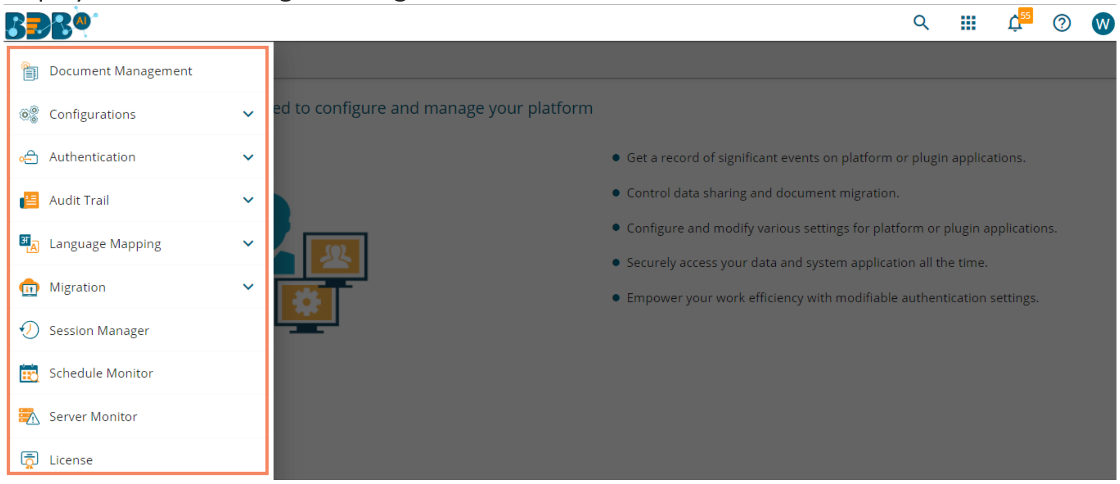
v) The user gets directed to the '**Admin Module**' page.

vi) Click the '**Menu**' icon.



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

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



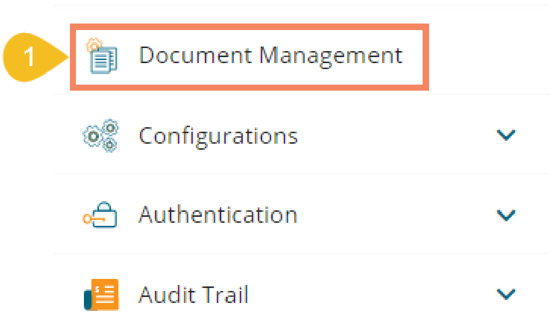
4.2. Administration Options

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

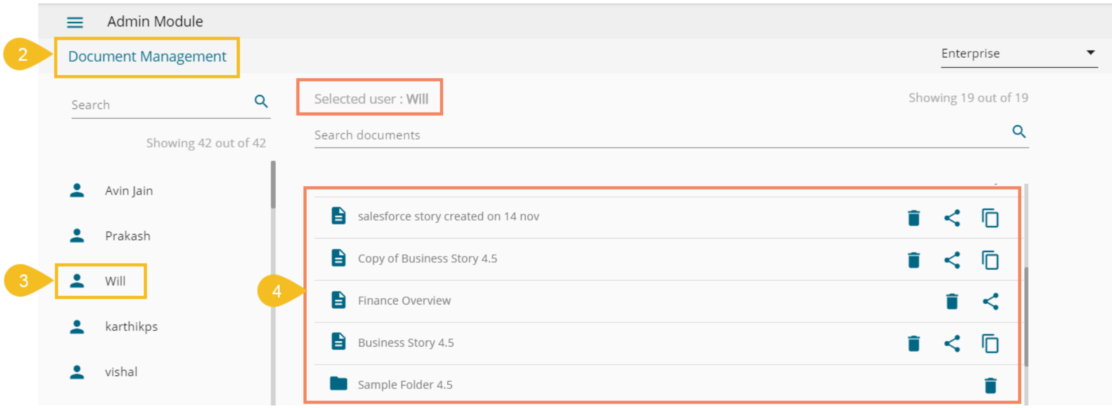
4.2.1. Document Management

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

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



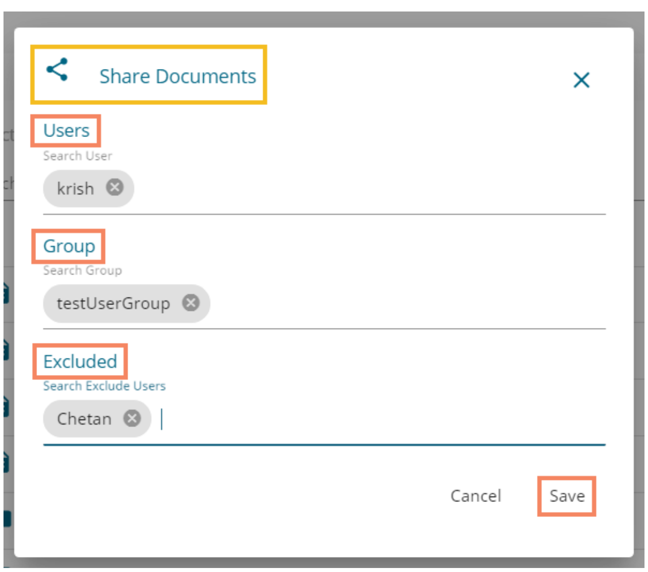
ii) The user gets directed to the ‘**Document Management**’ window.
iii) Select a user from the ‘**Users**’ list.
iv) A list of documents created by that user displays.



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

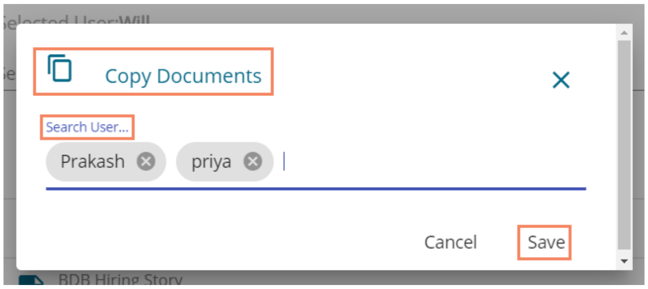
Note:

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



d. Steps to Copy a document:
Click the ‘**Copy**’ icon -> the Copy Document window opens -> search and select the user(s) -> Click the

‘**Save**’ option



4.2.2. Configurations

This section covers configuration details for various platform plugins.

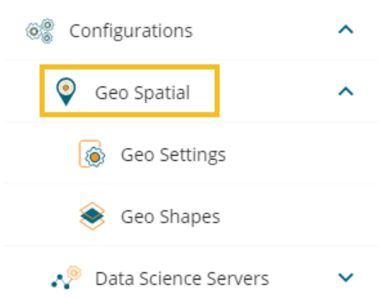
4.2.2.1. Geo-Spatial

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).

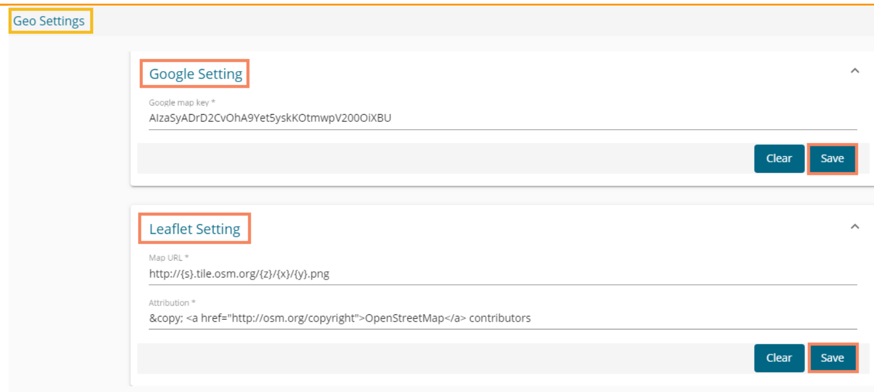
ii. Click the ‘**Save**’ option.

d. Fill in the following information for the ‘**Leaflet Settings**’:

i. **Map Url:** URL of the selected map (provided by the open-source vendors)

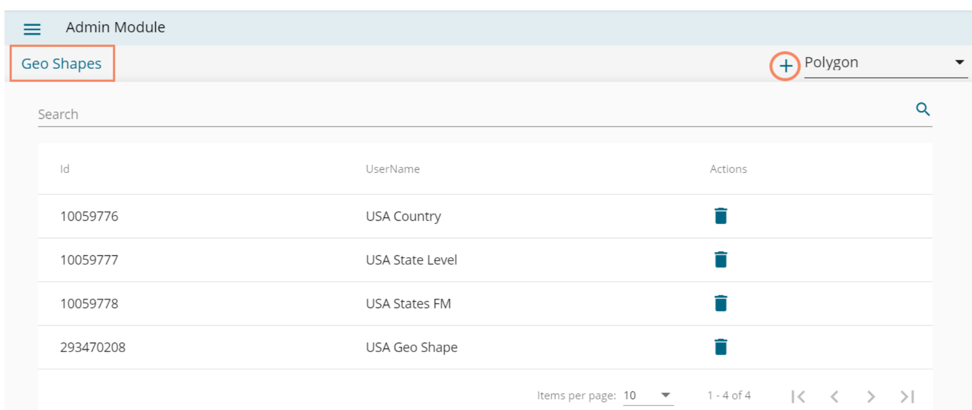
ii. **Attribution:** Configuration parameters for the map (provided by the open-source vendor)

iii. Click the ‘**Save**’ option.



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

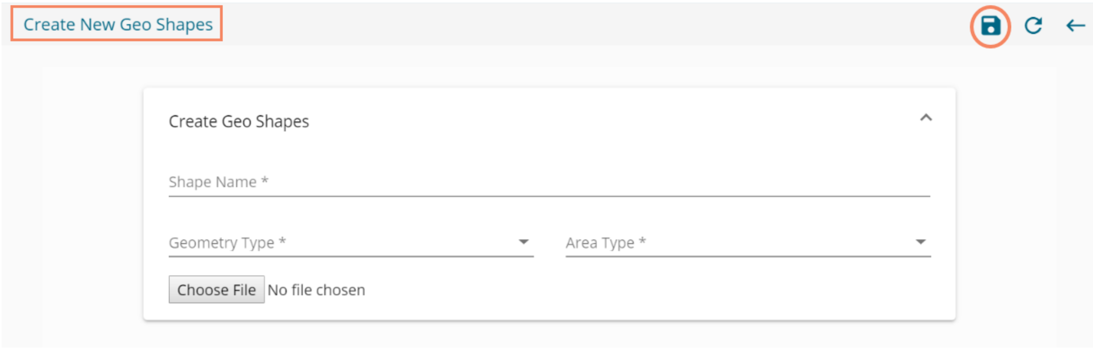
- **Uploading a Geo Shape File**
  a. Click the '**Geo Shapes**' option from the Geo Settings configuration option.
  b. The '**Geo Shapes**' page opens.
  c. Click the '**Create New Geo Shape**' icon from the Geo Shapes page.



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

iv. **Choose File**: Browse a shapefile from the system and upload (Only '**json** 'and '**js**' formats are supported)

f. Click the '**Save**' icon to save the inserted details.



g. A message will pop-up to assure that the file has been uploaded.

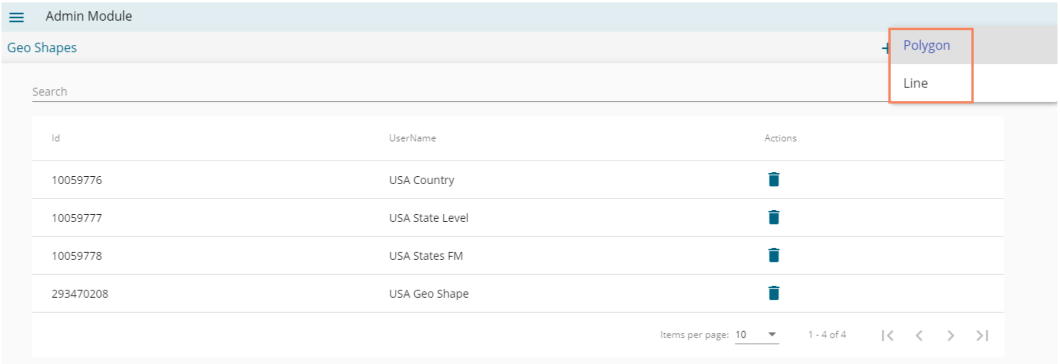
h. All the uploaded Geo Shapefiles get displayed in the list format.

Note:

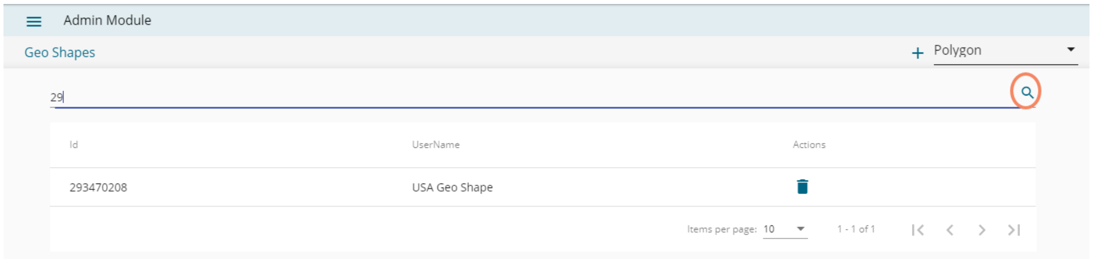
a. Select a Geometry Type using the drop-down menu.

i. Polygon

ii. Line



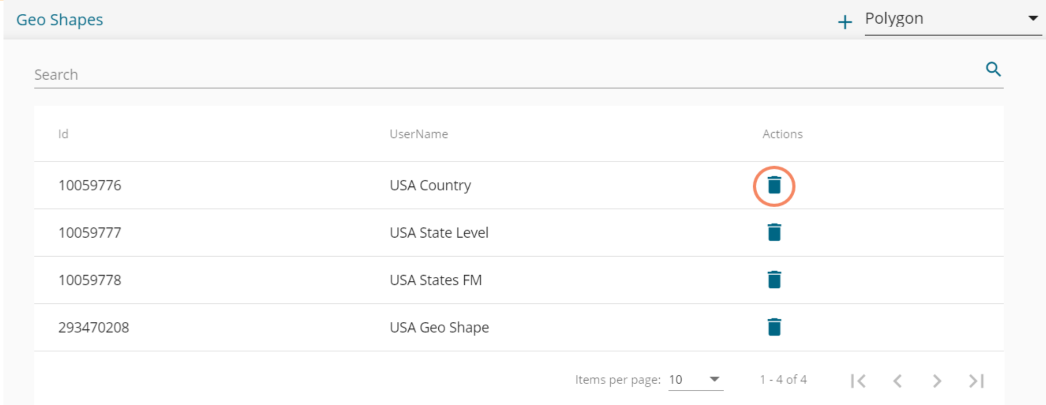
b. Use the '**Search**' space to search a Geo Shapefile from the displayed list.



c. Deleting a Geo Shape File

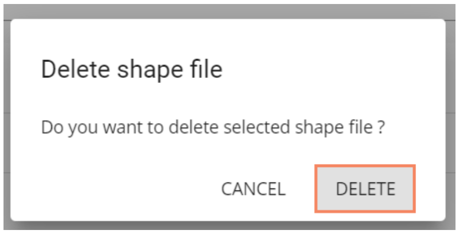
i. Select an uploaded Geo Shapefile from the list (as displayed at the bottom of the window).

ii. Click the '**Delete**' icon provided next to a Geo Shape File.



iii. A new window opens to confirm the deletion.

iv. Select the '**DELETE**' option.



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

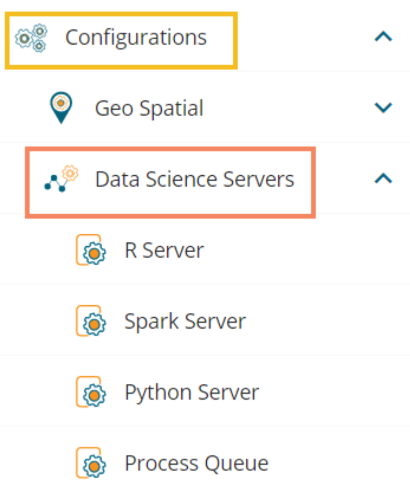
4.2.2.2. Data Science Servers

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.

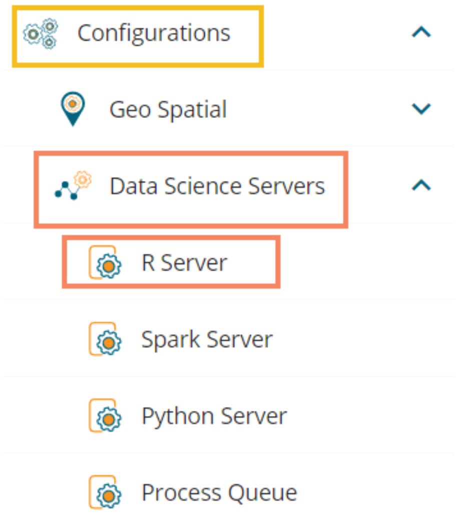
b. Various Data Science Servers get listed.



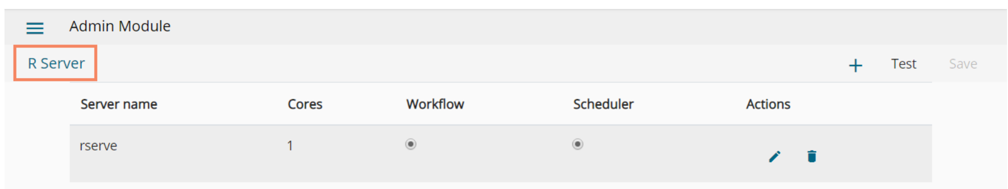
- **Steps to Create a New R-Server**

  a. Navigate to the '**Data Science Servers**' admin option.

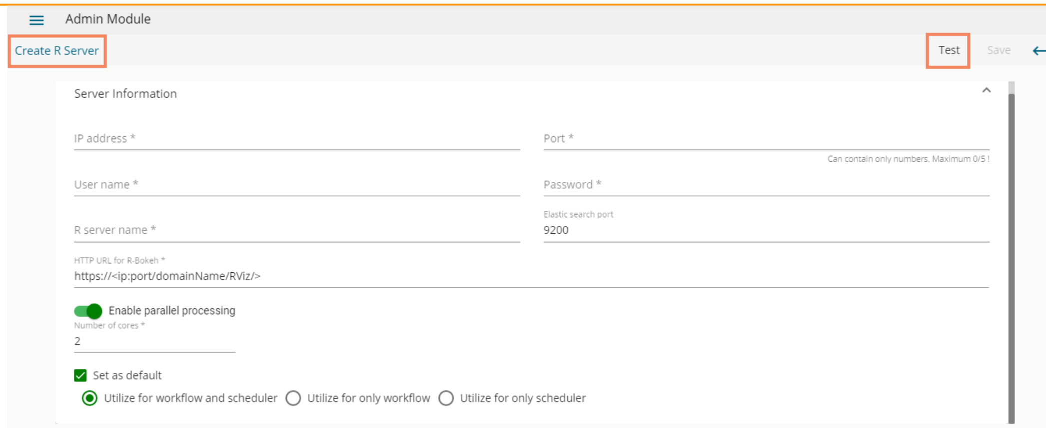
  b. Click the '**R Server**' option.



c. The R Server page opens.
d. Click the ‘**Add new server**’ icon.

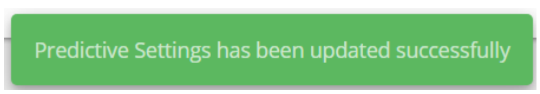


e. Click the ‘**Create New Server**’ + icon
f. A scrollable window opens asking Basic Information for new R Server
g. Provide the following information to configure a new R server:
   i. IP Address: IP address of the R-server
   ii. Port: R-Server’s port number
   iii. Username: Enter a username to log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

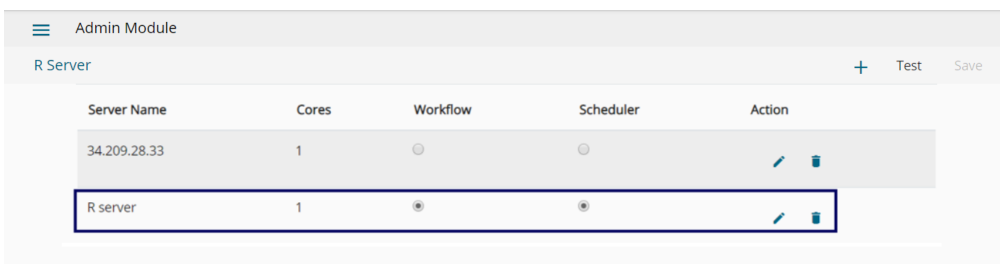


i. A message appears to assure the connection.
j. The '**Save**' option gets enabled
k. Click the '**Save**' option to save the verified R-server configuration details.

l. 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.



Note:

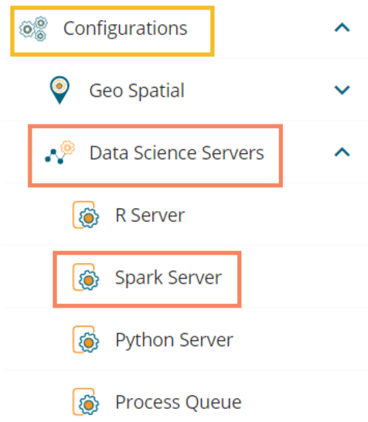
a. The user can click '**Edit**' icon from the R Servers window to modify the R Server settings.
b. The user can click the '**Save**' from the R Servers window to save the edited R Server settings.
c. The Administrator can configure multiple R-Servers, but the process execution happens on a single server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

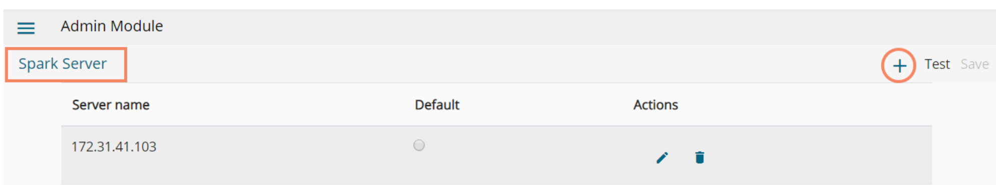
a. Navigate to the ‘**Data Science Servers**’ admin option.

b. Click the ‘**Spark Server**’ option.



c. The Spark Server page opens.

d. Click the ‘**Add New Server**’ + icon.

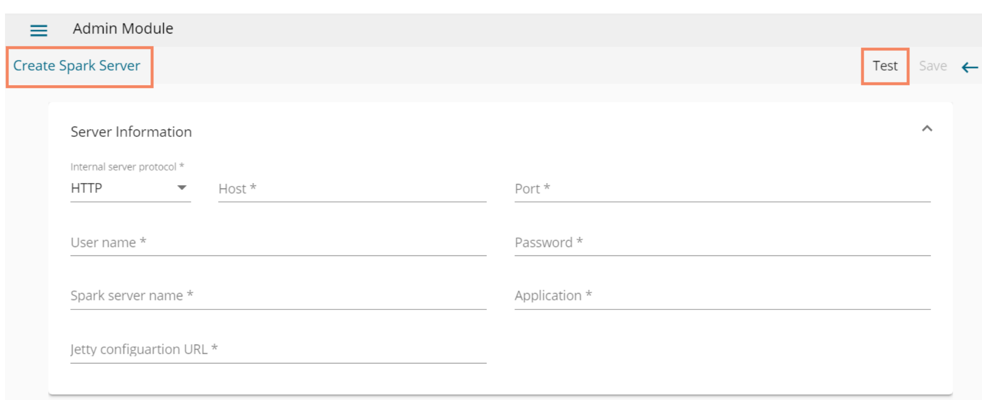


e. A new window ‘**Add Spark Server Configuration**’ opens

f. Provide the following information:

   i. Host: Host address of the Spark server
   ii. Port: Spark server’s port number
   iii. 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.

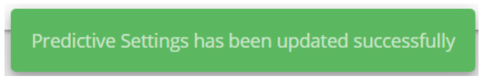


   i. A message appears to assure the connection.

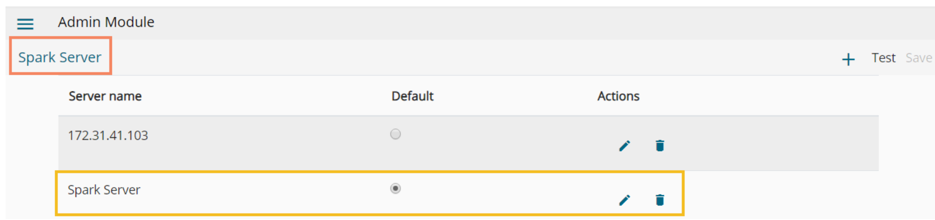
ii. The ‘**Save**’ option gets enabled.

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.

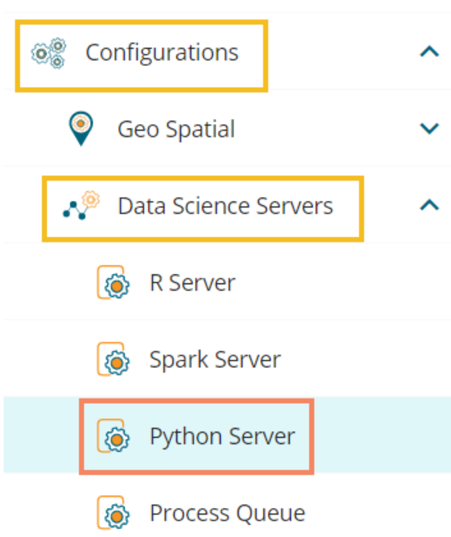


- **Python Server**

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

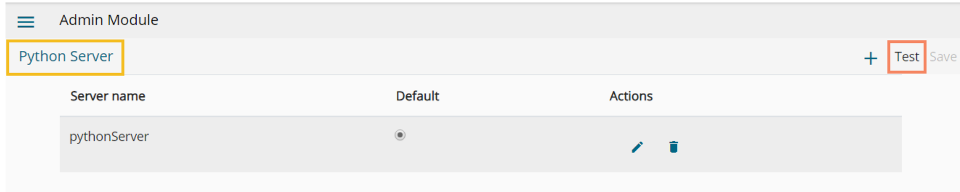
  a. Navigate to the ‘**Data Science Servers**’ admin option.

  b. Click the ‘**Python Server**’ option.

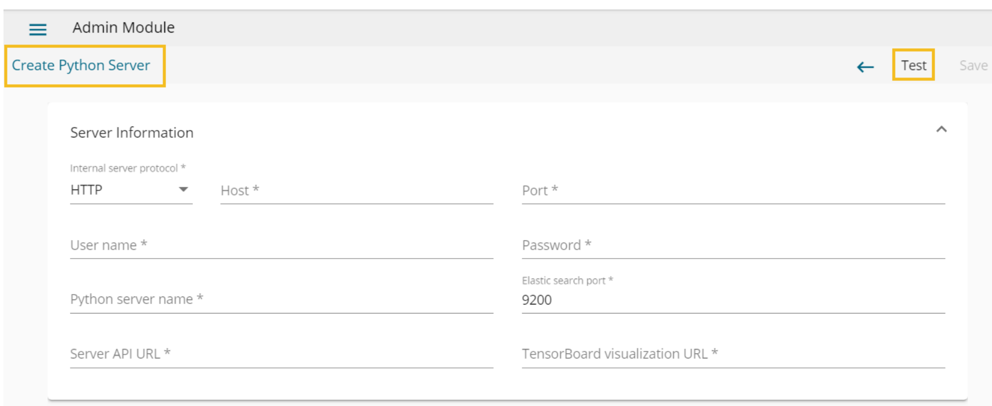


  c. The Python Server page opens.

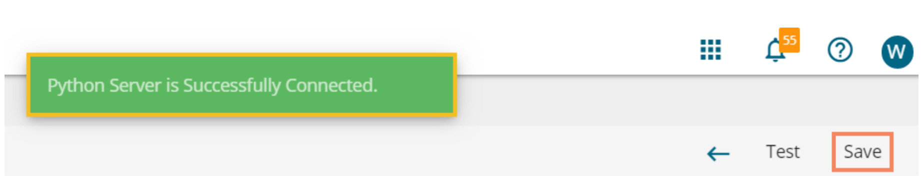
  d. Click the ‘**Add new server**’ + icon to add a new Spark server confirmation.



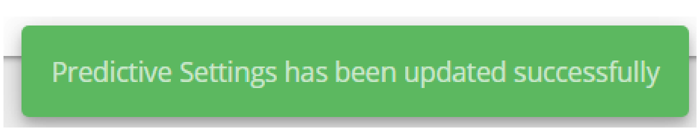
e. The '**Create Python Server**' configuration window opens.
f. Provide the following information:
   i. Host: Host address of the Spark server
   ii. Port: Spark server's port number
   iii. Username: Enter a username to log in to the Spark server
   iv. Password: Enter the password for the above username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



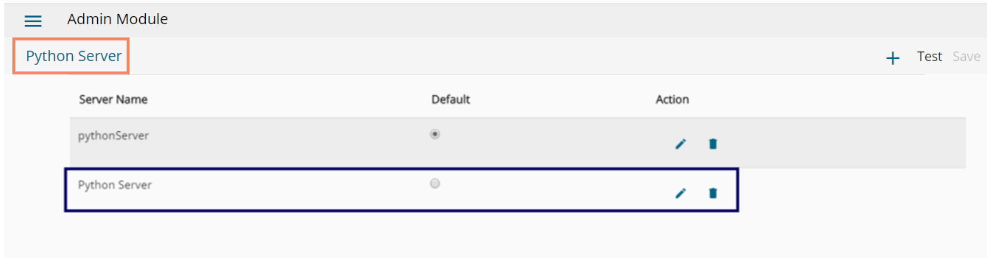
h. A message appears to assure the connection.
i. The '**Save**' option gets enabled.
j. Click the '**Save**' option to save the verified Python server information.



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



l. The newly configured Python Server gets added to the ‘**Python Servers**’ window.



Note:

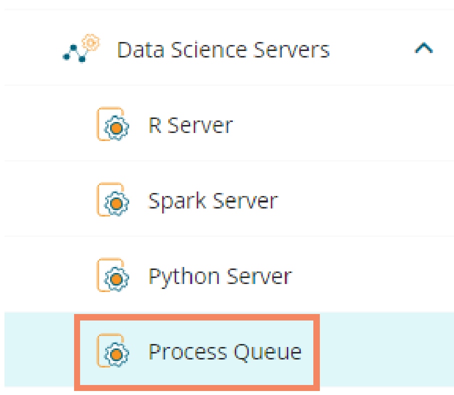
a. Click ‘**Edit**’ icon to modify an existing python server configuration

b. Click the ‘**Delete**’ icon to remove the selected Python server details from the list.

- **Process Queue**

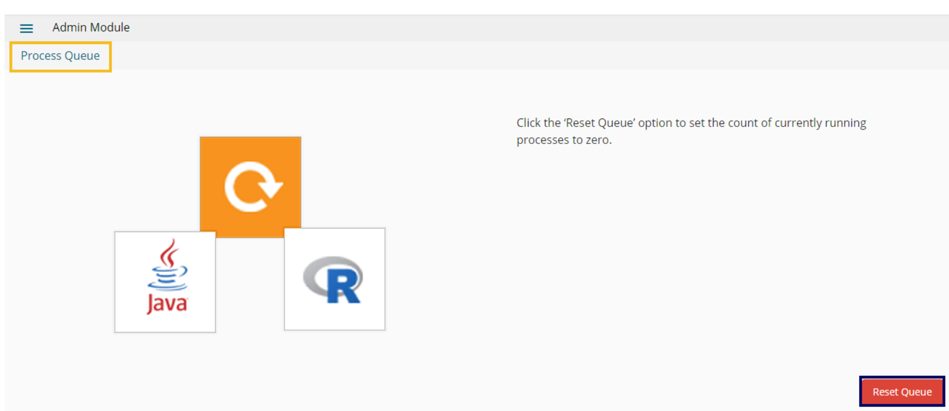
  Users can reset the Predictive process queue through this Predictive Settings option.

i) Click the ‘**Process Queue’** option from the Data Science servers.



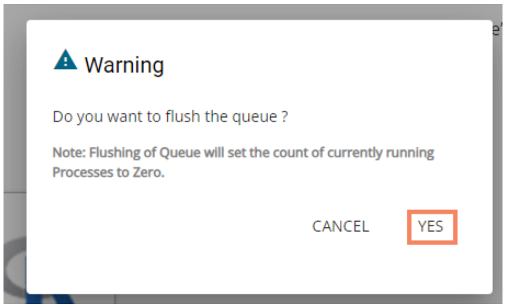
ii) The Process Queue page opens.

iii) Click the ‘**Reset Queue**’ option.



iv) A warning message appears, asking whether the user wants to flush the queue.

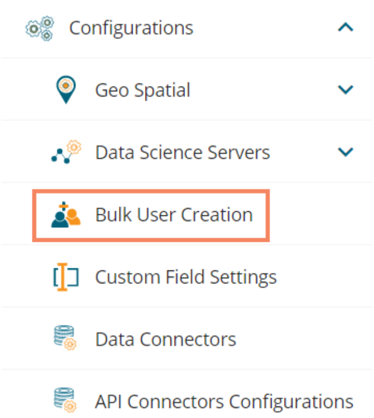
v) Click the '**YES**' to set the count of currently running processes to Zero for the Data Science Workbench.



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.

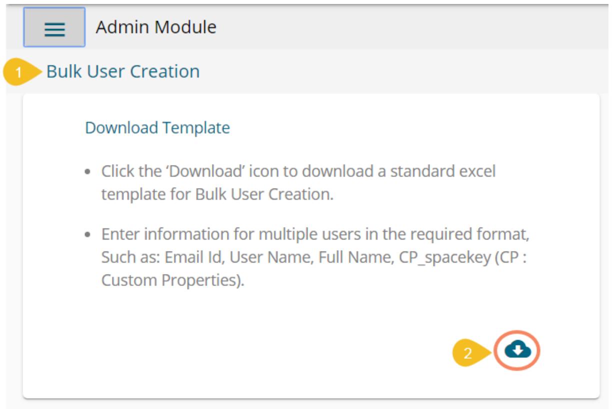


ii) The '**Bulk User Creation**' page opens.

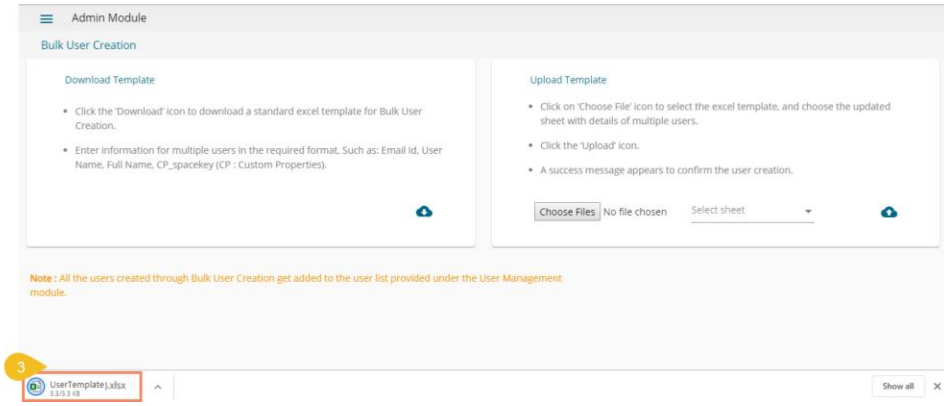
iii) The Bulk User Creation gets completed in two steps, as explained below:

<u>Step- 1 Download the Standard Template</u>

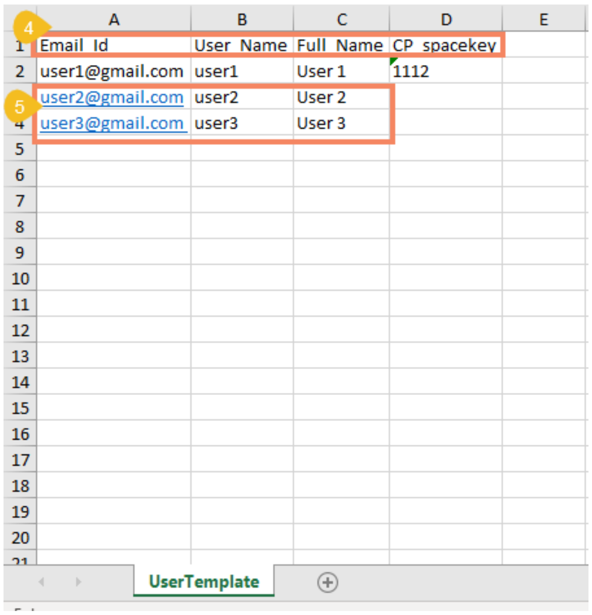
1. Navigate to the '**Bulk User Creation**' page
2. Click the '**Download**' icon.



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

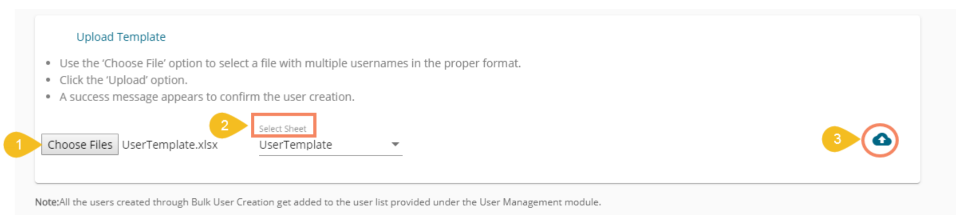


4. The admin can insert multiple users in the downloaded user template.
5. Use the following format (as shown in the image) to enter the user details.



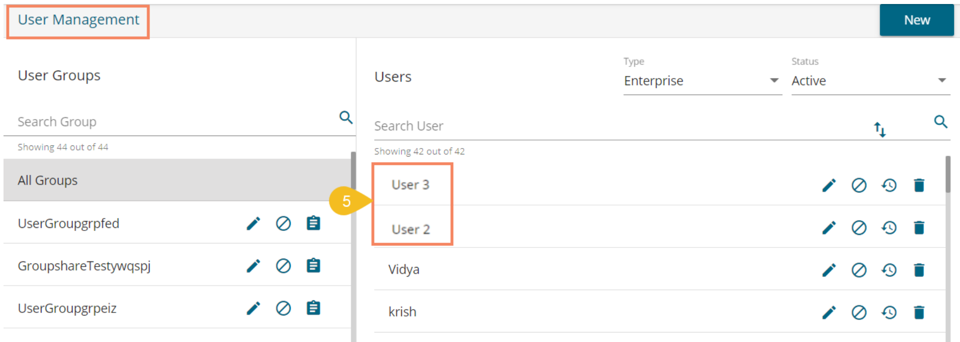
Steps-2 Upload a file with multiple usernames

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.



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.



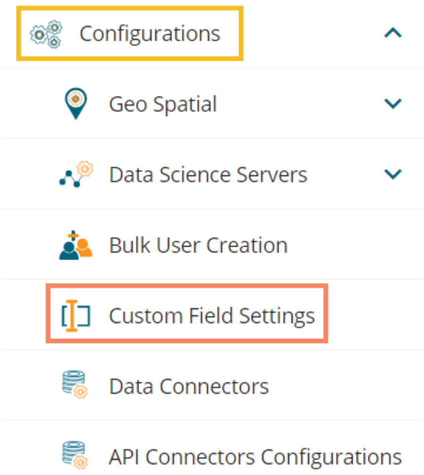
Note:

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.



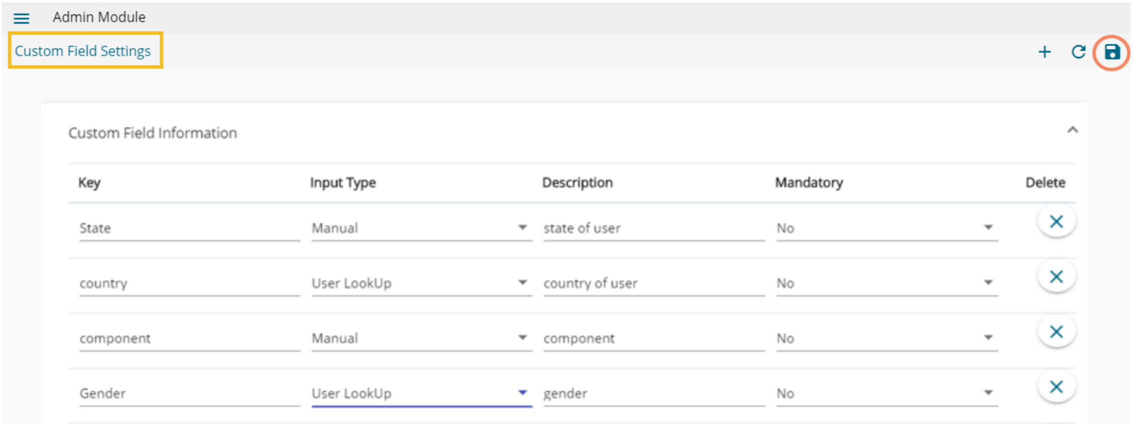
b. The Custom Field Settings window opens.
c. Provide the following information for each custom field:
   i. Key: Provide the key value of the custom field.

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**' icon to save the inserted custom fields.



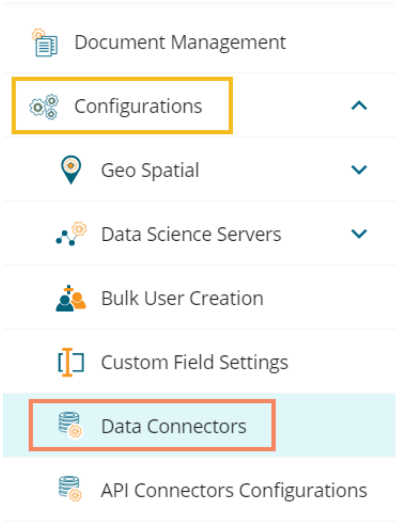
Note:

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

4.2.2.5. Data Connectors

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

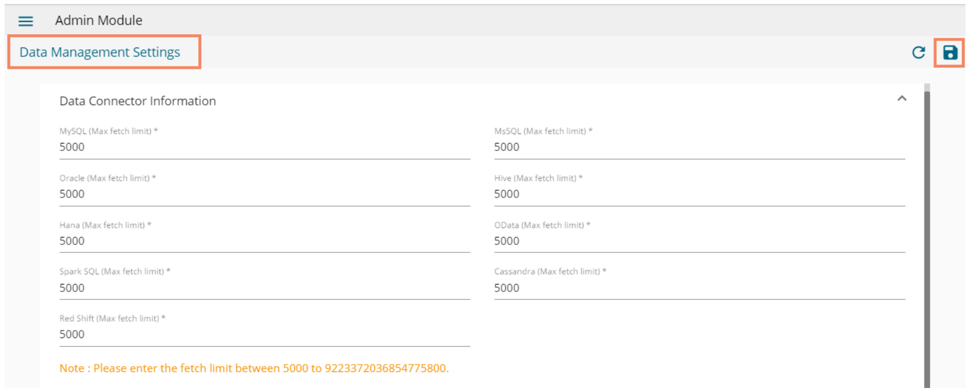
i) Click the '**Data Connectors**' option from the list of Configurations.



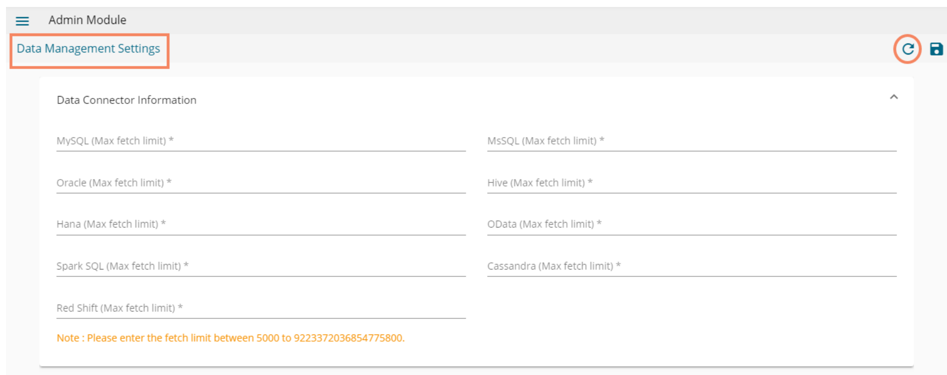
ii) The '**Data Management Server Settings**' page opens.

iii) The users can set the Max Fetch Size for the listed data sources.

iv) Click the '**Update Settings**' icon to save the entered Max Fetch Size for data.



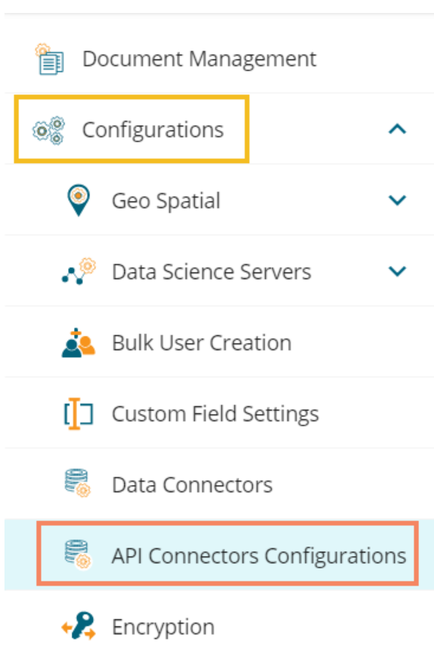
v) Click the '**Refresh**' icon to erase the entered information.



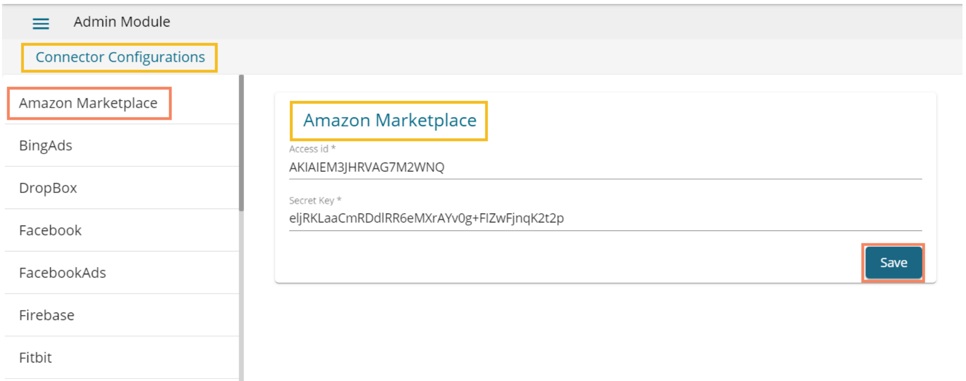
4.2.2.6. API Connectors Configurations

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.



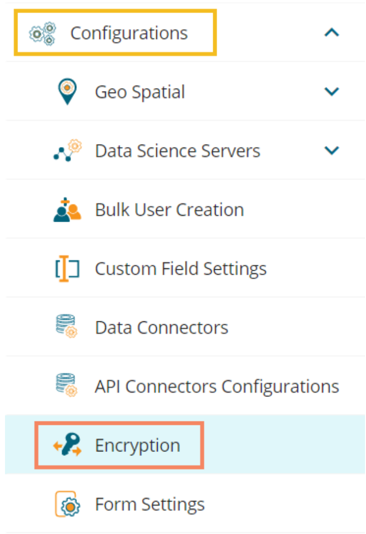
vi) A message appears to confirm the connector configuration.

4.2.2.7. Encryption

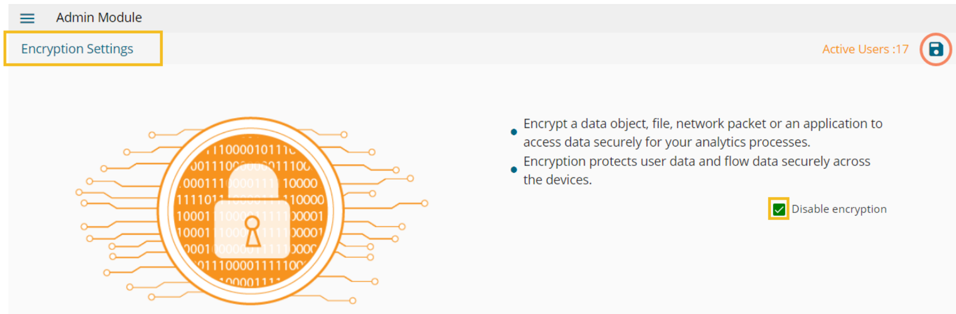
Encryption is the process of encoding a message or information in such a way that only authorized users can access it. The primary purpose of this technology is to protect the privacy of digital data stored on computer systems or transmitted via the Internet or other computer networks.

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.



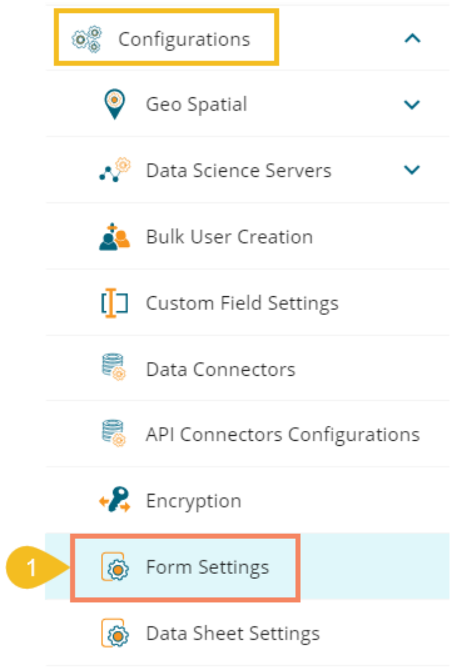
ii) The ‘**Encryption Settings**’ page opens.
iii) Enable Encryption by a checkmark in the box.
iv) Click the ‘**Save**’ icon.



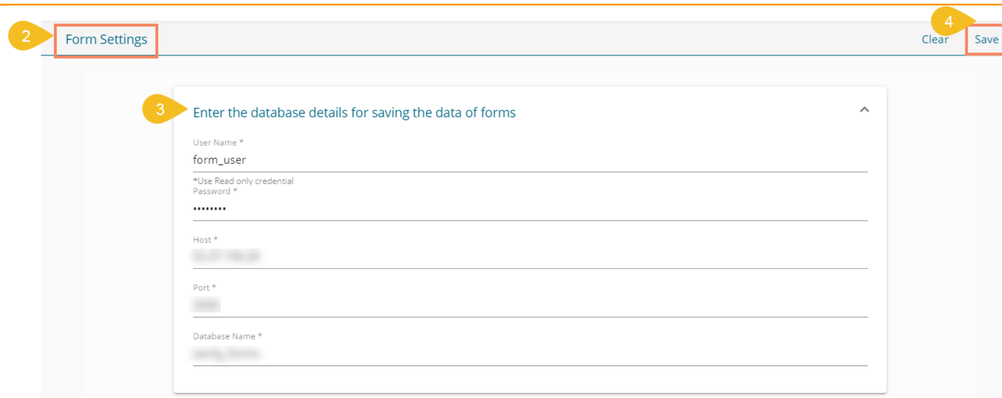
4.2.2.8. Form Settings

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.



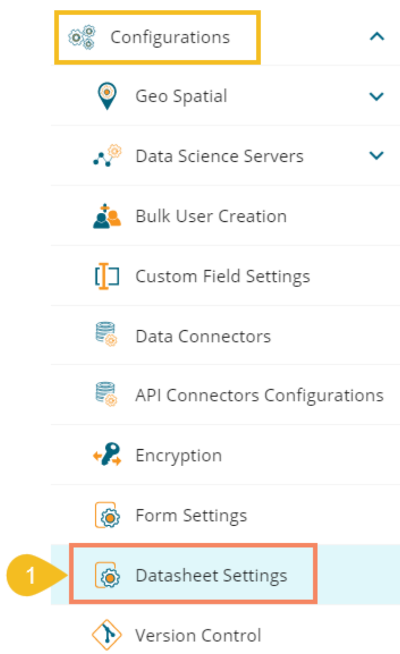
Note:

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.

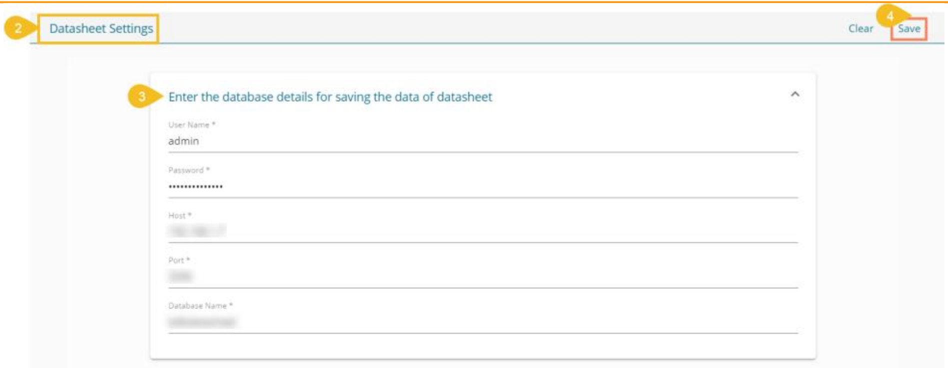
vii) Click the '**Data Sheet Settings**' from the configurations admin option.



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

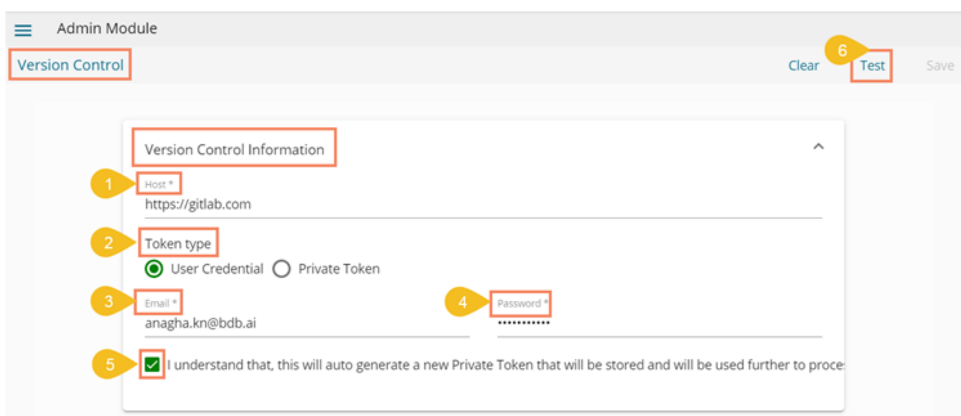
x) Click the '**Save**' option to save the entered settings information.



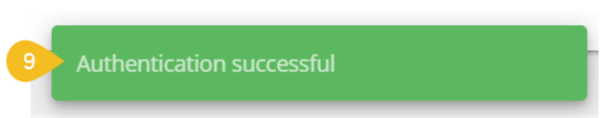
4.2.2.10. Version Control

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

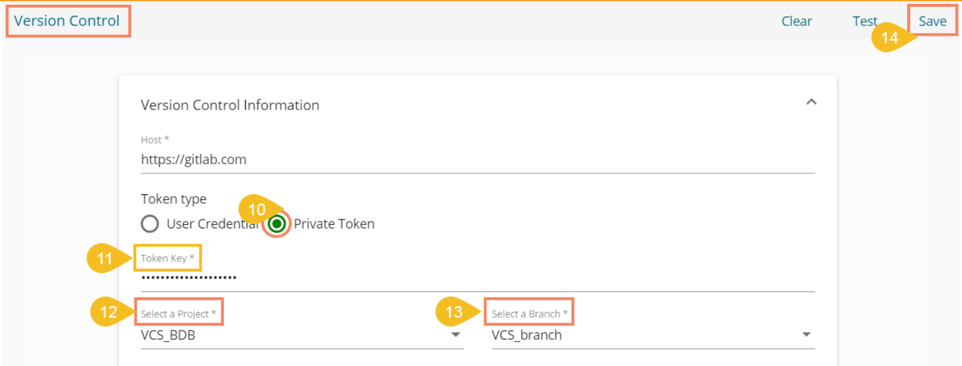
i) Click the '**Version Control**' option from the Configurations options.
ii) The Version Control page opens.
iii) Provide the Host address of the GitLab link.
iv) Select the '**User Credential**' as Token type (if the user can select the '**Private Token**' option if the user has access to the Private 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.



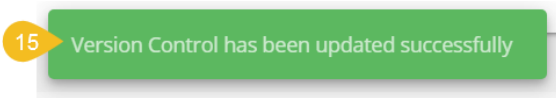
ix) A success message appears.



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.



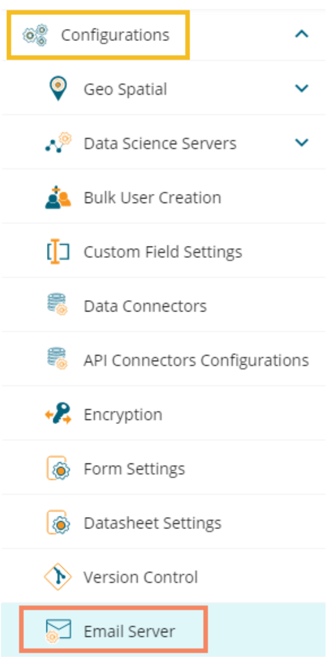
xv) A success message appears to inform the version control update.



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

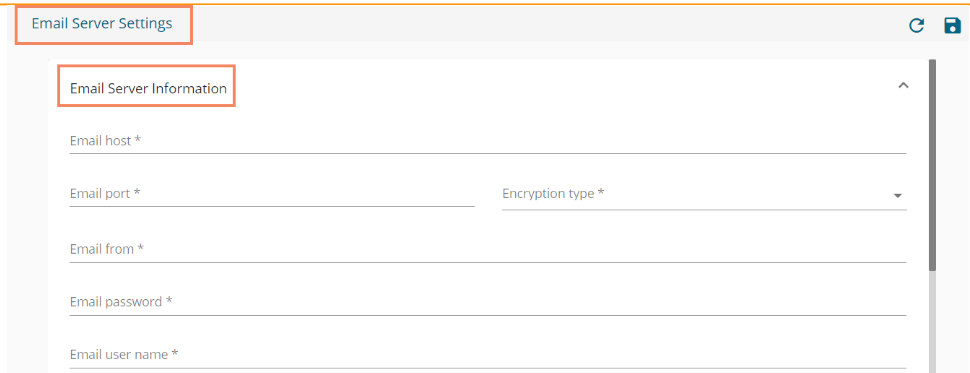
b. **Email Port**: Port number of SMTP

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



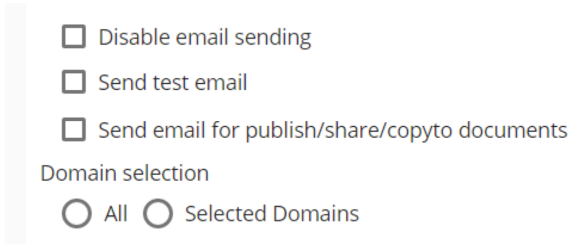
iv) Configure the following alert options for email by putting checkmarks:

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)



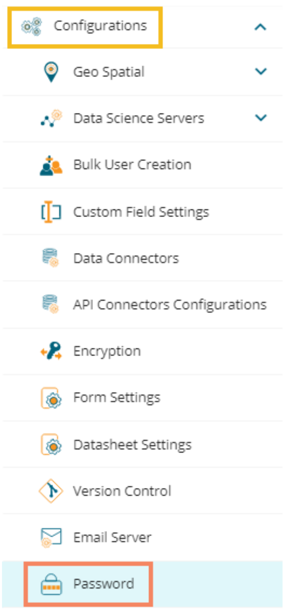
vi) Click the '**Update settings**' icon to save the email server information.

vii) Click the '**Clear all Setting**' 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.

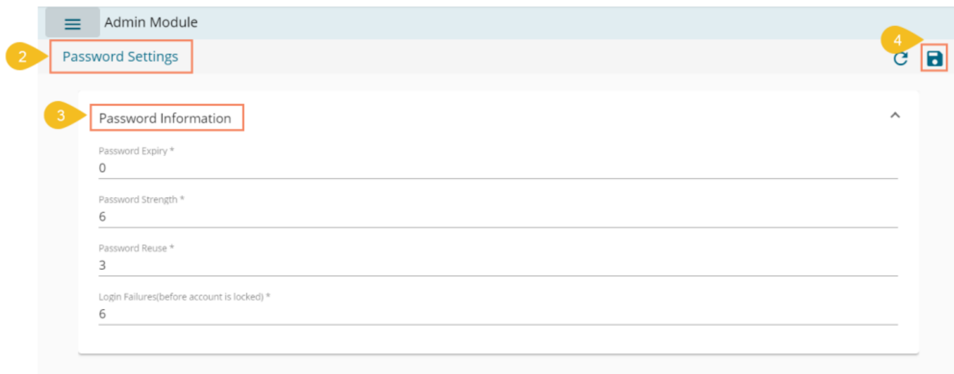


ii) The ‘**Password Settings**’ page appears.

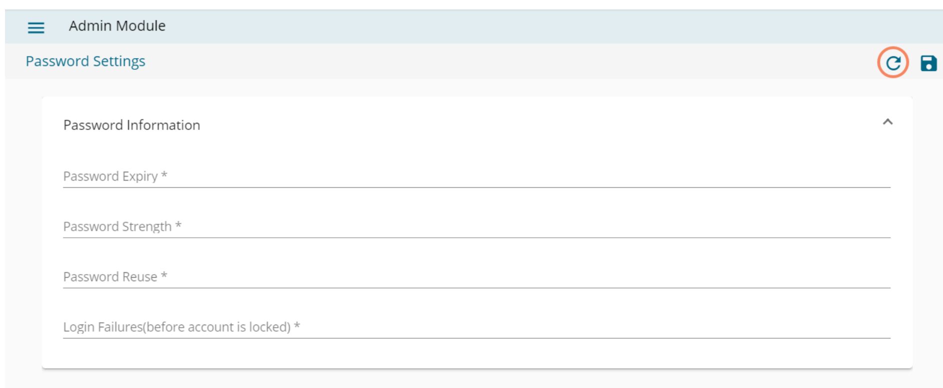
iii) Provide the following information:

- **Password Expiry (Days):** Set password validity (in days)
- **Password Strength (:** Set password length (6 to 16)
- **Password Reuse:** Set a limit to restrict the user from using an old password (last 3 passwords cannot be reused)
- **Login Failures (No. of User Login Failure):** Set the number of chances provided to the user for logging in with wrong passwords (Maximum login chances provided to the user are 3. The user account gets blocked if a user enters the wrong password more than 3 times.)

iv) Click the ‘**Update Password**’ icon to save the entered password information.



v) Click the ‘**Refresh**’ icon to erase the entered password information.



Note:

a. The administrator can block any user who fails to enter the correct password for 3 times.

b. A user can log in with the same password only when the administrator enables the user again. **(**The password must be a combination of alphabetical letters, numerical 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

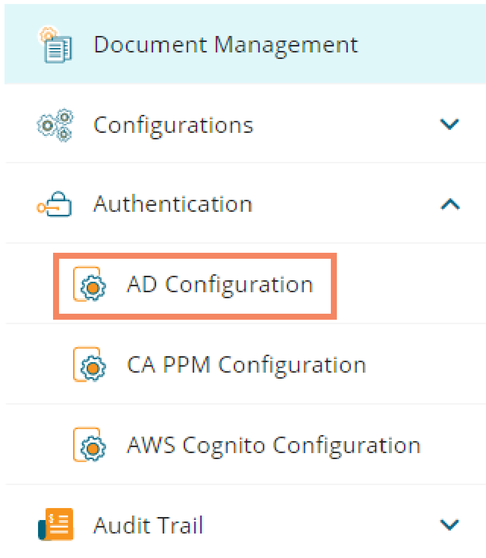
The user can authenticate the Windows AD accounts through this admin option.

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.



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.

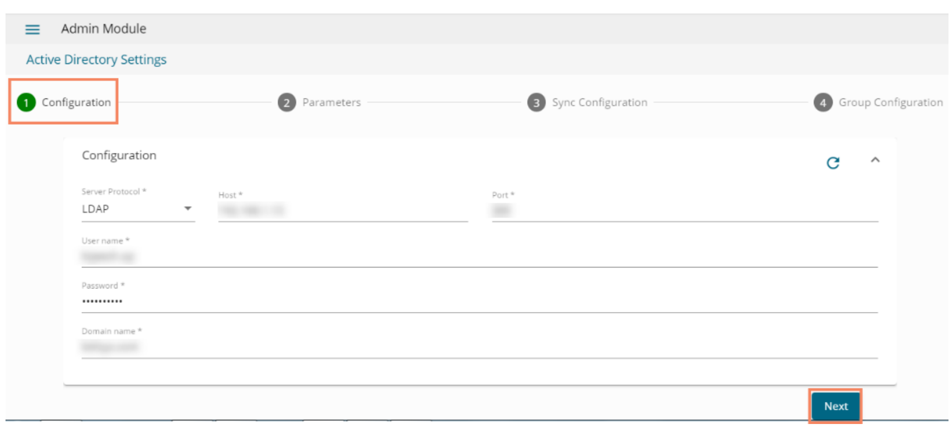
vii) Enter the secured **Password.**

viii) Provide **IP address/Host** of the Windows AD server.

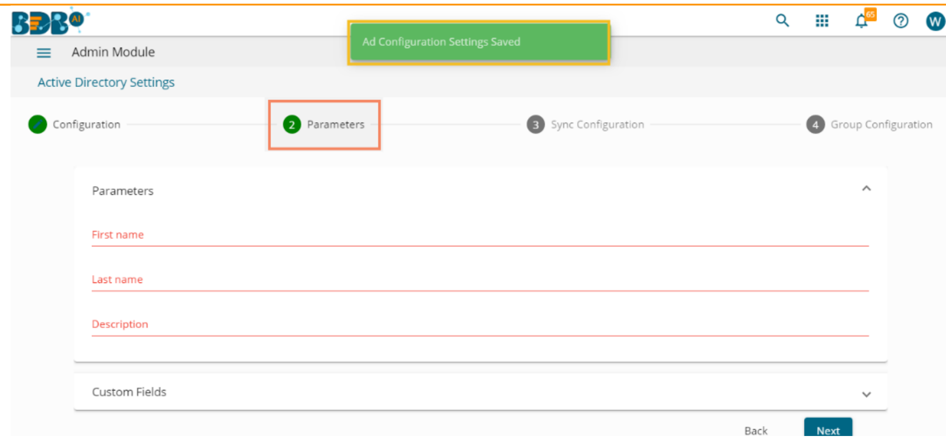
ix) Provide the **Port** number of Windows AD.

x) Enter the **Domain name.**

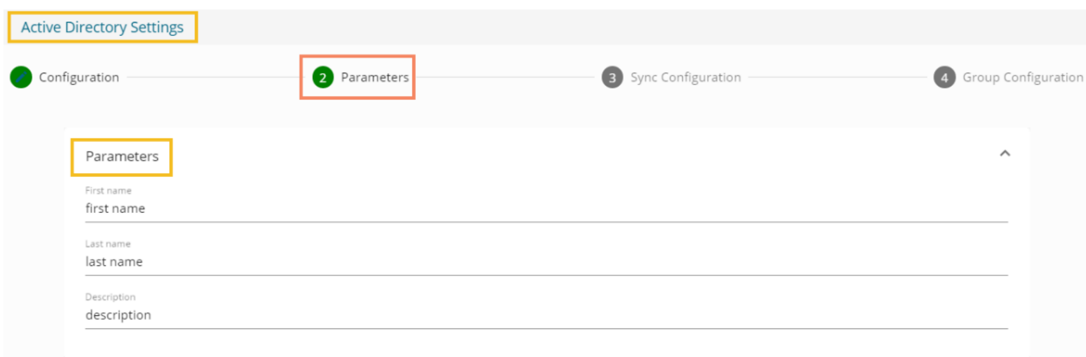
xi) Click the **‘Next’** option to proceed.



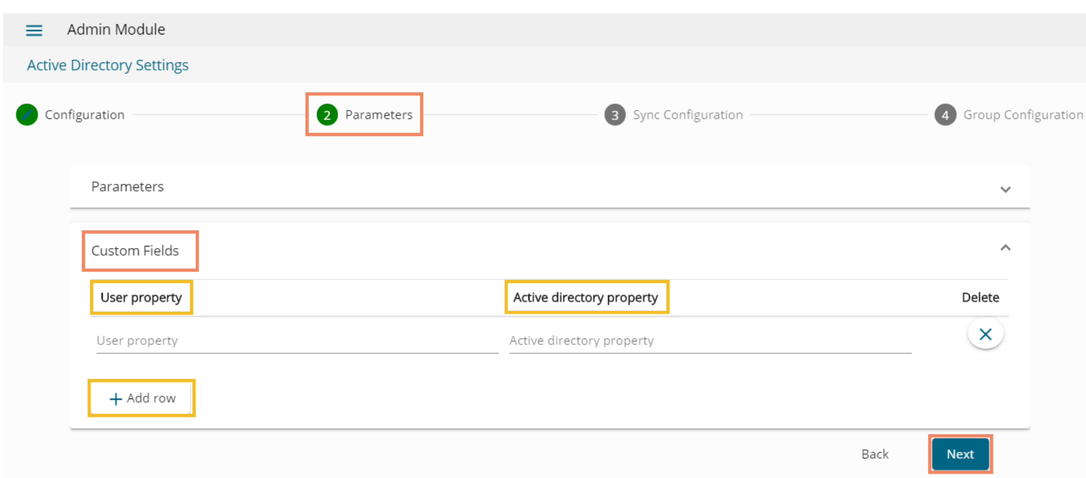
xii) A message appears to confirm the action and leads to the ‘**Parameters**’ tab.



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.

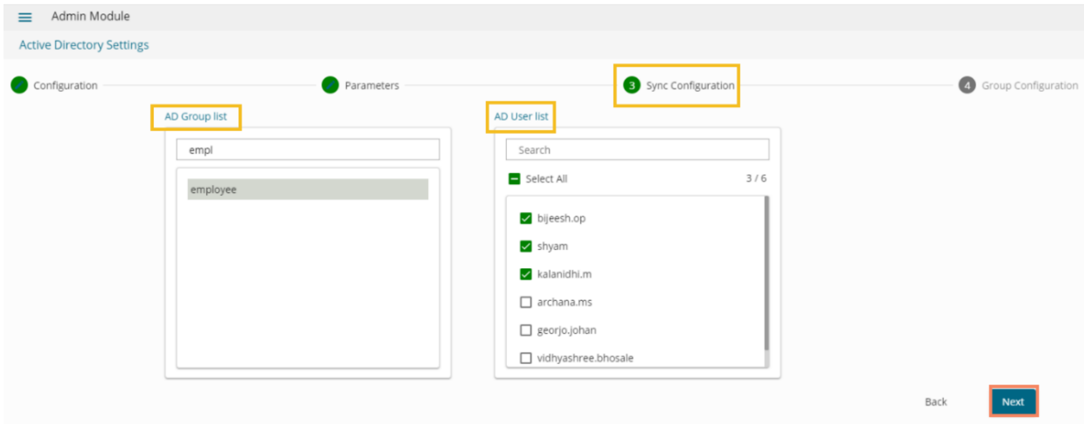


xvii) Open the Custom fields from the drop-down menu.
xviii) Select an option from the available context menu.
xix) Enter Active Directory Property.
xx) Add a new custom field by clicking the ‘**Add row**’ icon.
xxi) Click the ‘**Next**’ option.

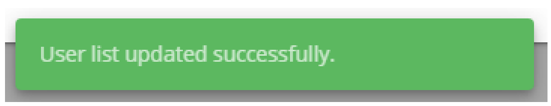


xxii) A success message appears to confirm the action and leads to the ‘**Sync Configuration**’ tab.

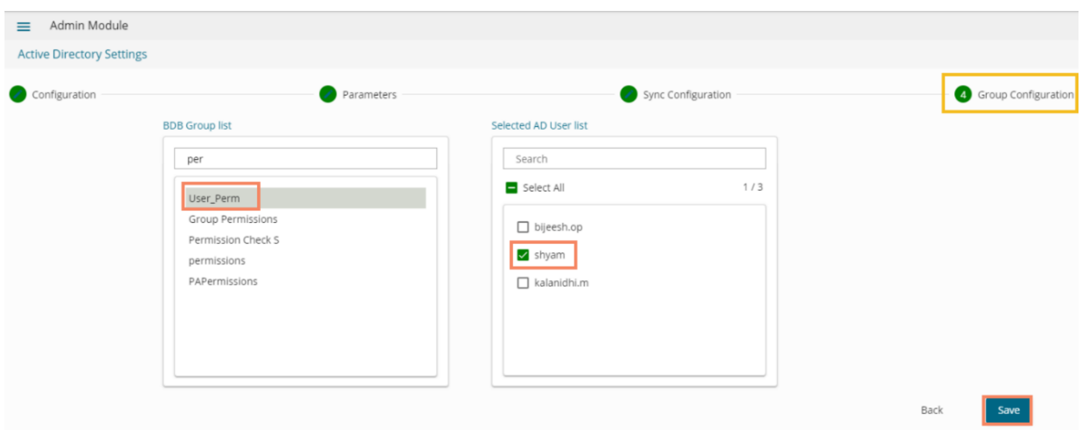
xxiii) Select a user group using the displayed AD Group list.
xxiv) Select users from the AD User list by putting the checkmarks in the boxes given next to the usernames.
xxv) Click the '**Next**' option to proceed.



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.



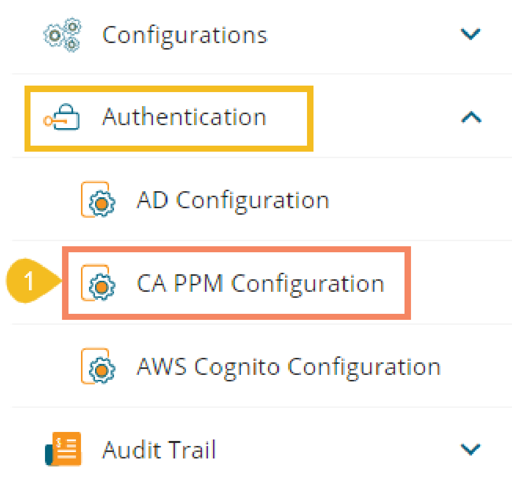
xxxi) A success message appears confirming that the user group has updated successfully.

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

4.2.3.2. CAPPM Configuration

This section explains how to configure Clarity.

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



ii) A new page opens with 3 steps mentioned on it.

iii) The fields for CA PPM Settings get displayed by default.

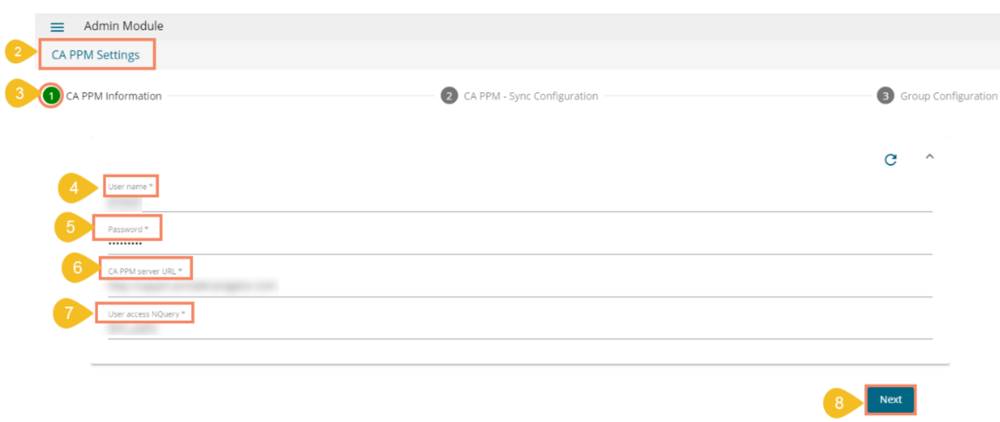
iv) Provide a **Username** of a **CAPPM** account**.**

v) Enter the valid **Password** for the selected CAPPM account.

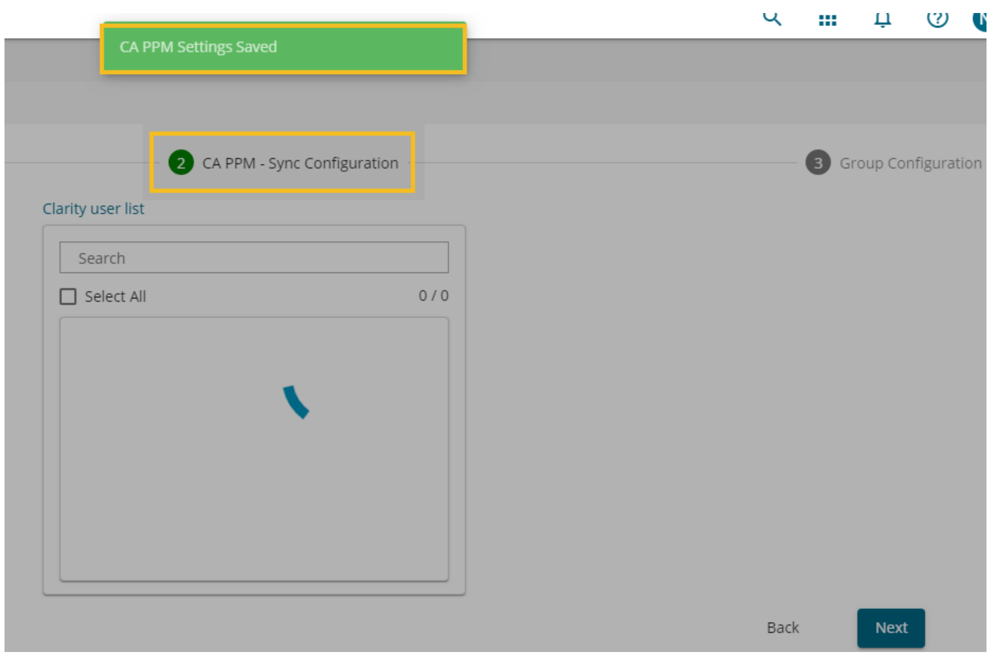
vi) Enter the CAPPM server URL**.**

vii) Provide the name of the query that fetches a list of the Clarity users in the '**User access NQuery**' field.

viii) Click the '**Next**' option to proceed.



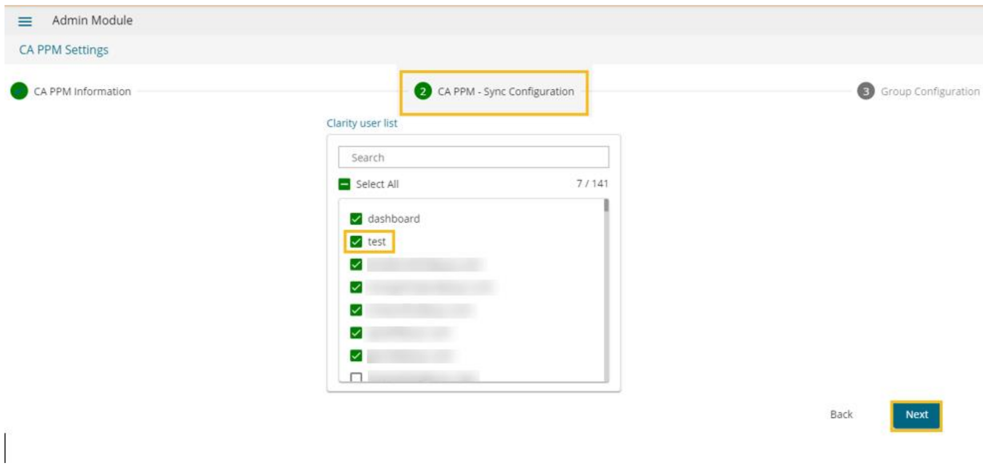
ix) A success message appears, and the administrator gets directed to the CA PPM Sync Configuration tab.



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.

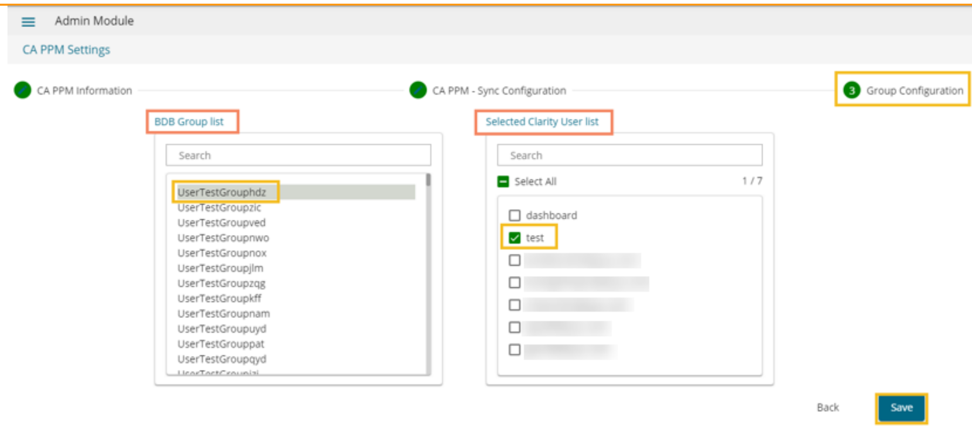


xiii) A success message appears to confirm the user list update and the administrator gets directed to the Group Configuration tab.

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.



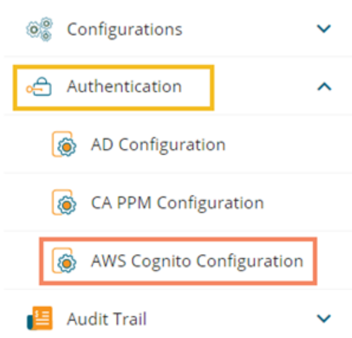
Note:

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

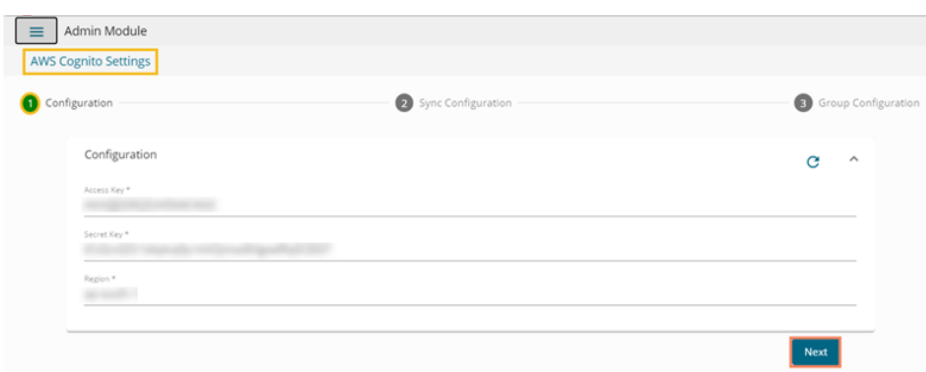
4.2.3.3. AWS Cognito Configuration

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.



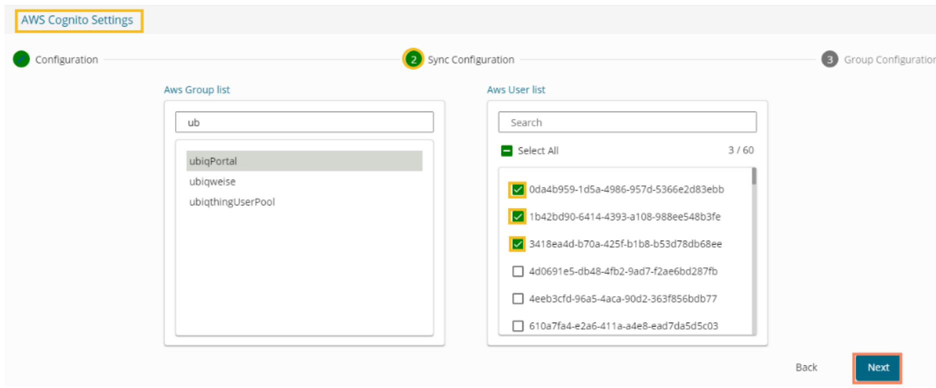
v) A success message appears to confirm the action.

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.



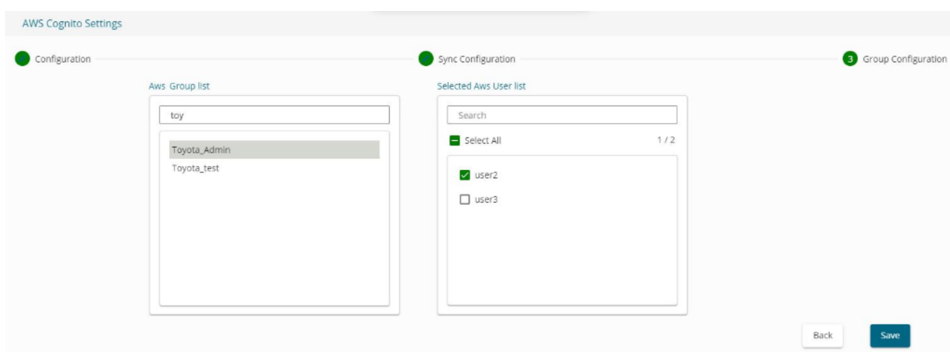
x) A success message appears to confirm that the user list has been updated.

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.

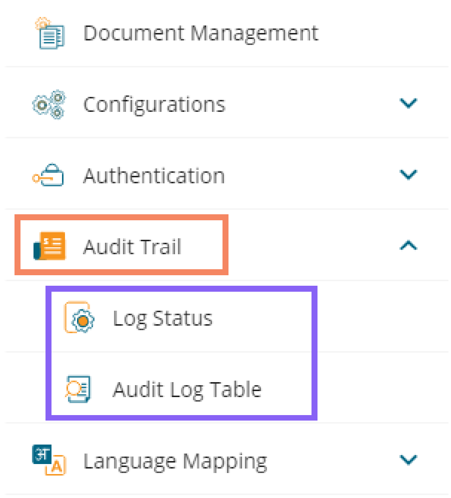


xv) A success message appears to confirm the action.

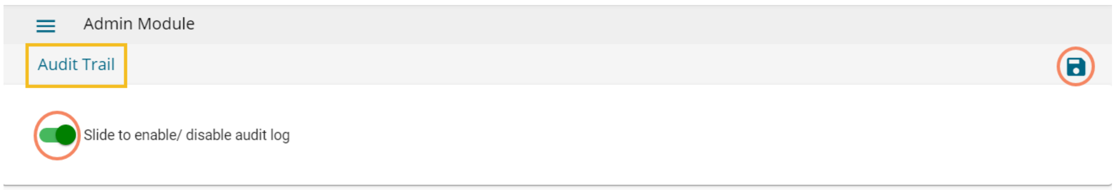
4.2.4. Audit Trail

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

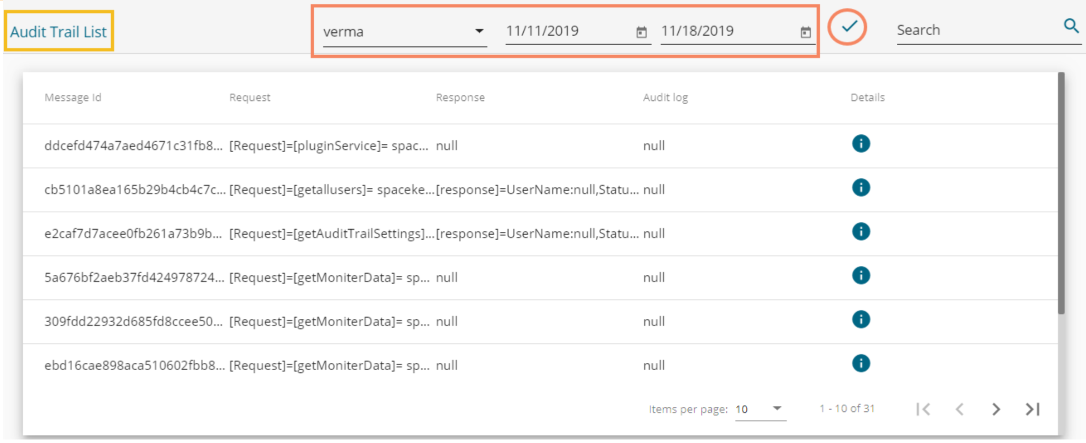
i) Click the '**Audit Trail**' option from the list of admin options
ii) Two options appear under the Audit Trail.
   1. Log Status
   2. Audit Log Table



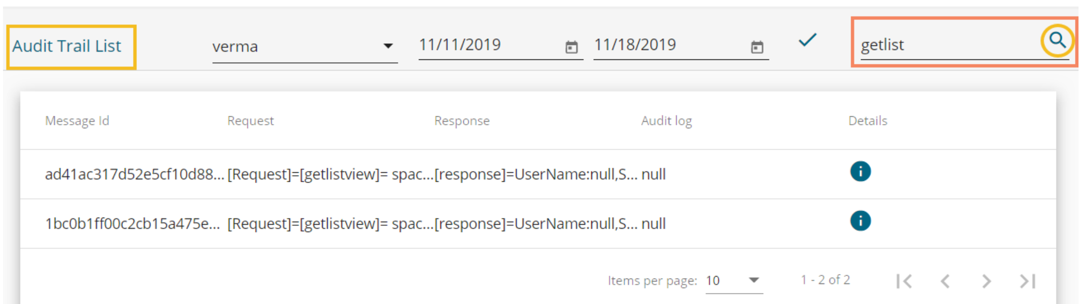
iii) Click the '**Log Status**' option.
iv) The '**Audit Trail**' page opens.
v) The administrator can enable or disable audit trail settings by sliding the given button.
vi) Click the '**Save**' icon to save the selected audit trail setting.



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.



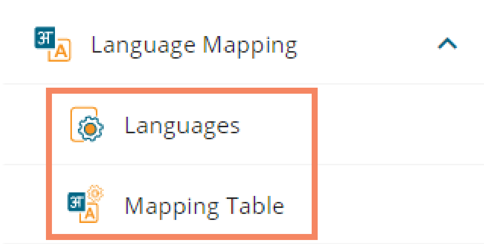
xiii) Enter a term in the search bar and click the '**Search**' icon to display specific log entries in the Audit Trail List.



4.2.5. Language Mapping

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

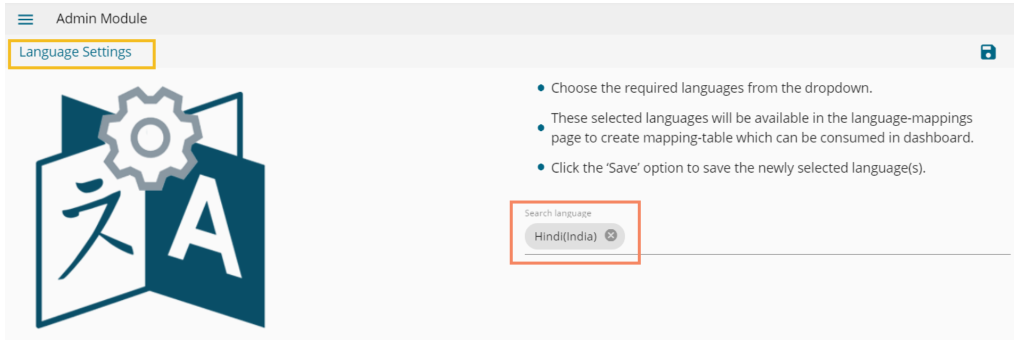
The Language Mapping gets completed in two steps which are as mentioned below:
Step-1: Languages
Step-2: Mapping Table



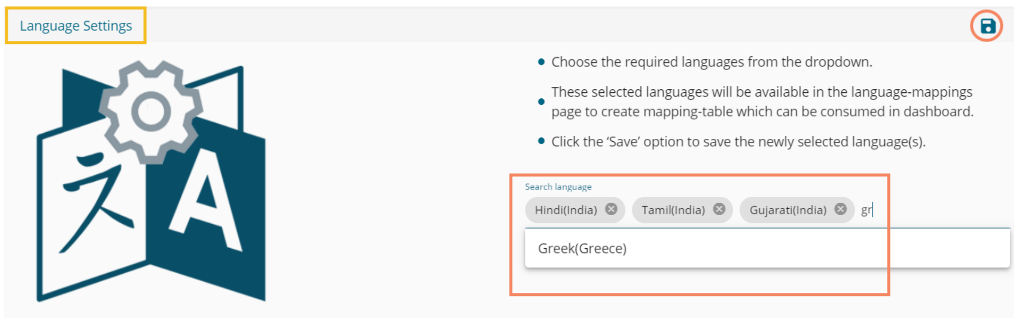
4.2.5.1. Languages: Adding more Languages

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

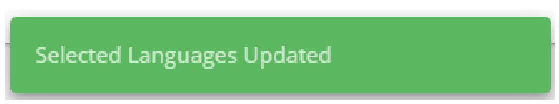
ii) Choose Languages option to add languages.
iii) The Language Settings page opens displaying the selected language(s).



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

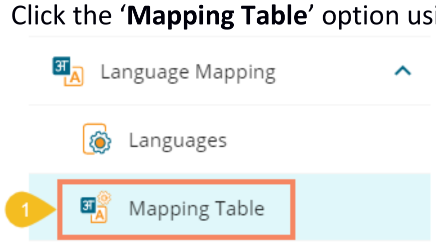


vi) The Language Setting gets updated, and a message appears to inform the same.

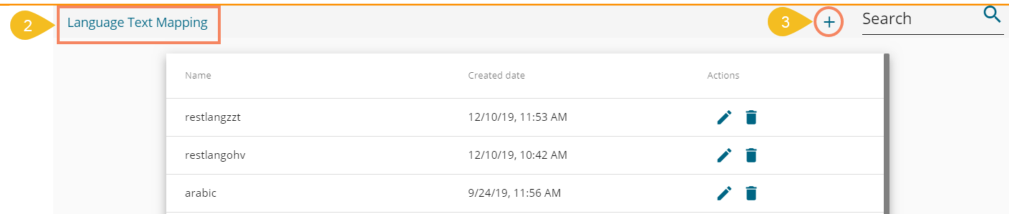


4.2.5.2. Mapping Table: Language Mapping Part

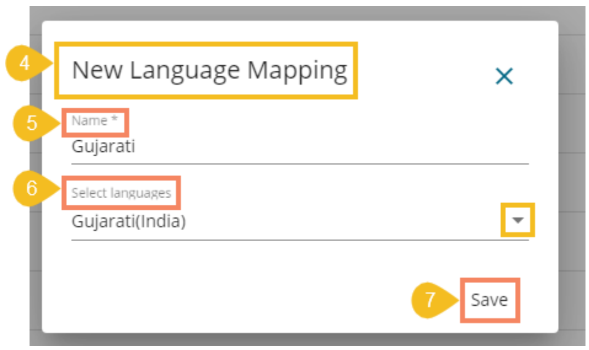
i) Click the '**Mapping Table**' option using the Language Mapping admin option.



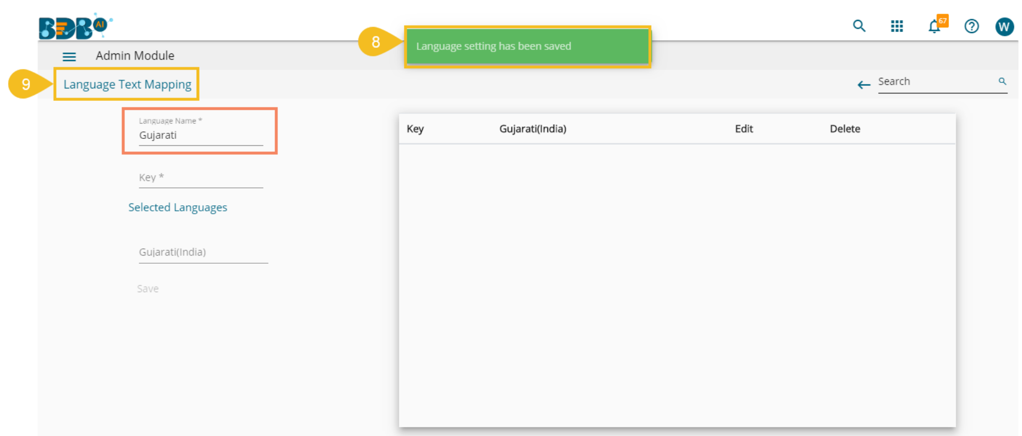
ii) The Language Text Mapping page opens with the list of available language mapping options.
iii) Click the '**Add new mapping**' + icon to add a new Language Text Mapping.



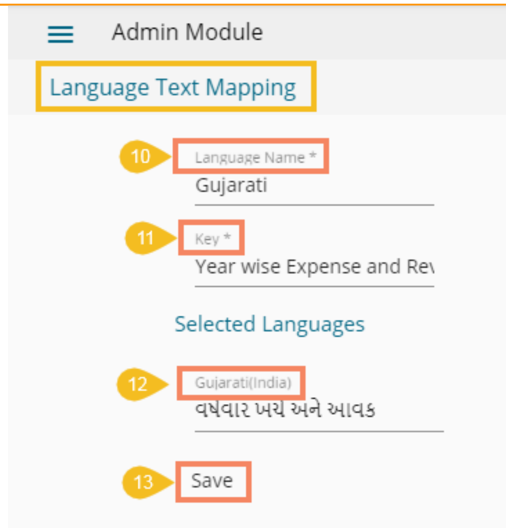
iv) The ‘**New Language Mapping**’ window opens.
v) Provide a name for the new Language Mapping.
vi) Select a language or multiple languages using the drop-down menu.
vii) Click the ‘**Save**’ option.



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.

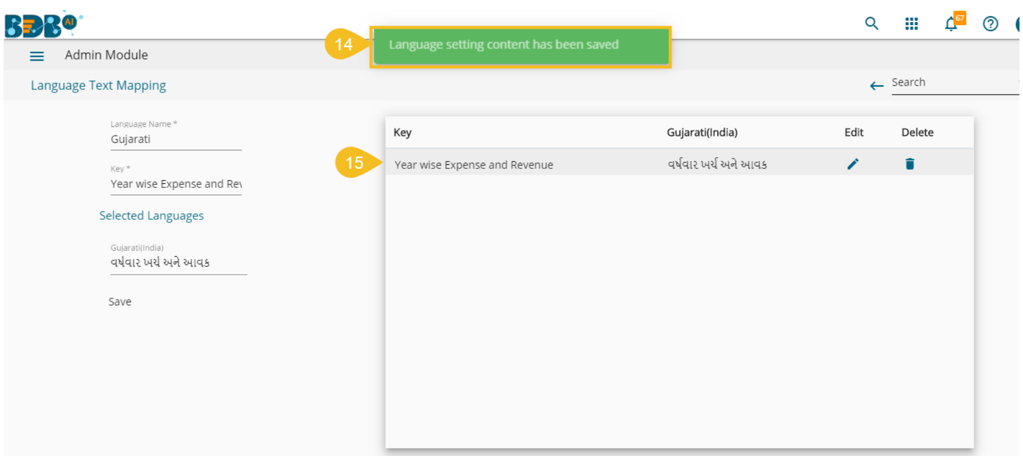


x) The newly added Language Name appears.
xi) Insert a key from the selected dashboard. (A dashboard must be selected from the Designer to get the key terms)
xii) Provide the translated synonym of the key in the selected language(s).
xiii) Click the ‘**Save**’ option.

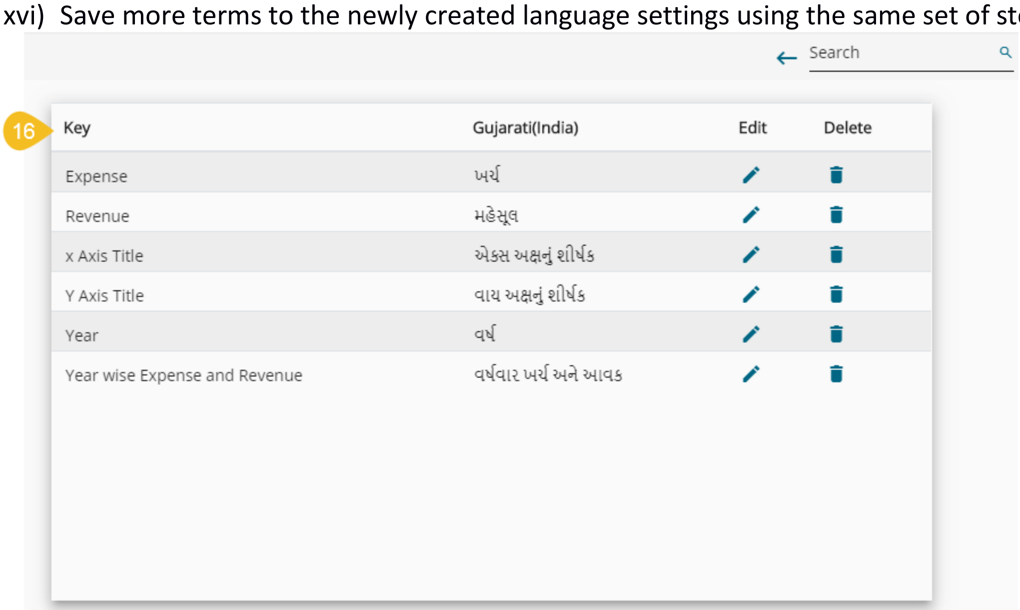


xiv) A success message appears to confirm the update in the Language Setting content.

xv) The saved key with its synonym in the selected language(s) gets added to the right-side list.

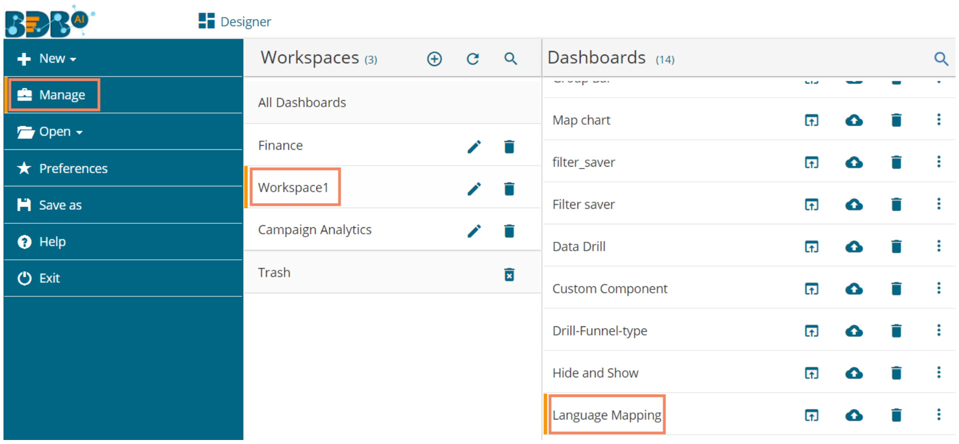


xvi) Save more terms to the newly created language settings using the same set of steps:

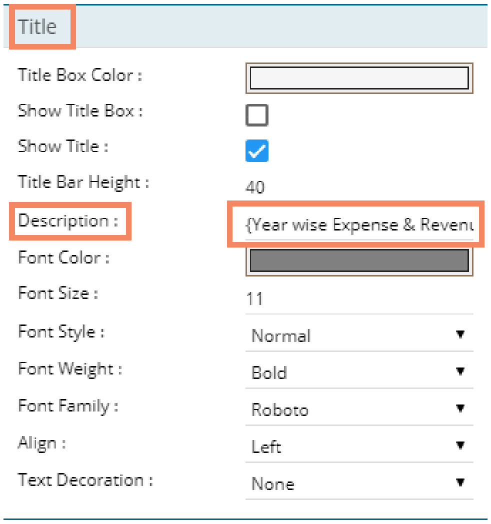


4.2.5.3. Configuring the Dashboard Settings

i) Select a saved dashboard using the Designer plugin.

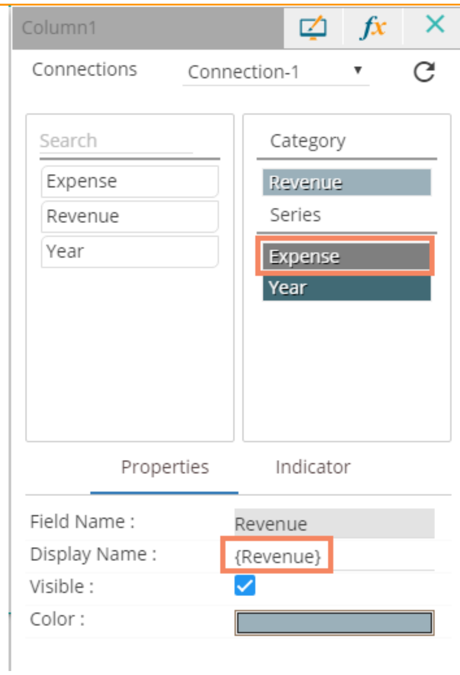


ii) Access the '**Title**' properties of the dashboard and make sure that the title description is provided in the "{}" brackets (if not then modify it accordingly)



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:

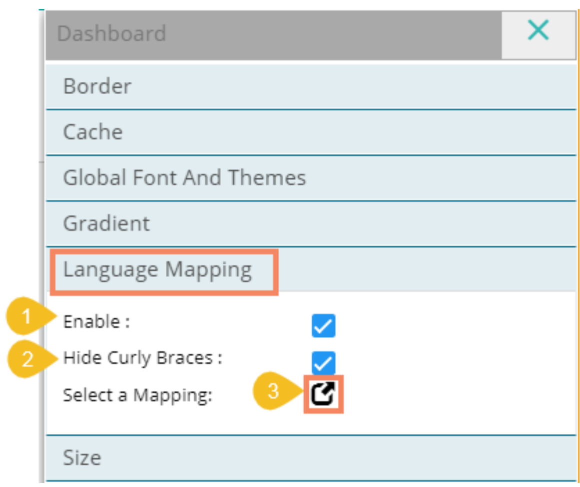


iii) Open the Dashboard Properties Panel and configure the Language Properties, as shown below:

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

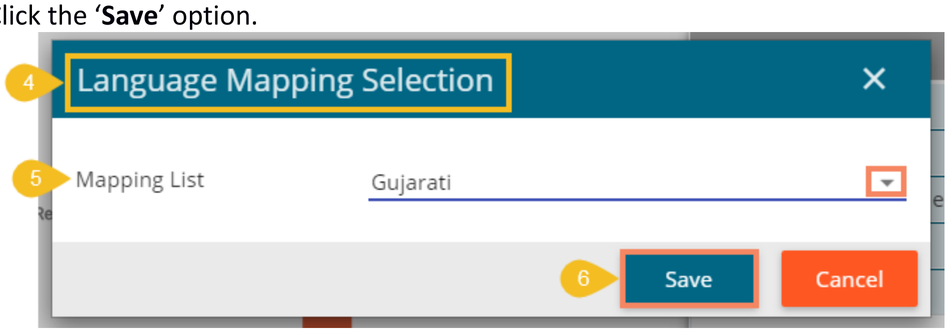
c. Click on the icon to select a mapping option.



iv) The '**Language Mapping Selection**' window opens.

v) Select a language using the Mapping List drop-down menu.

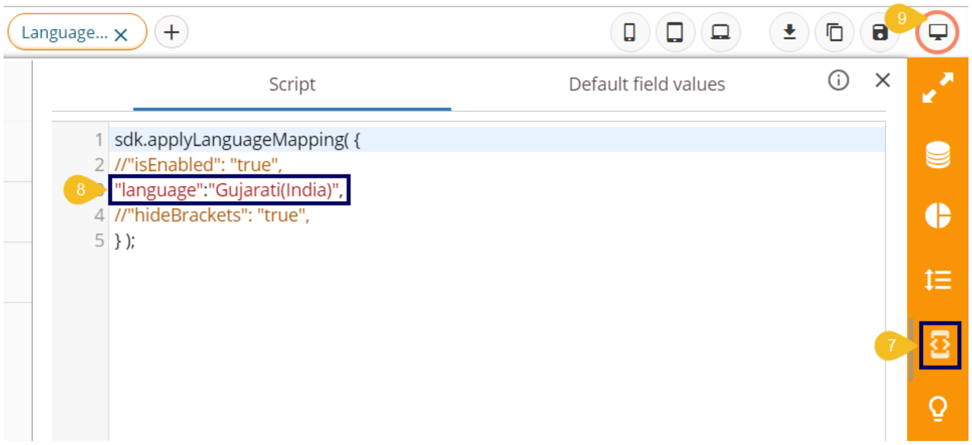
vi) Click the '**Save**' option.



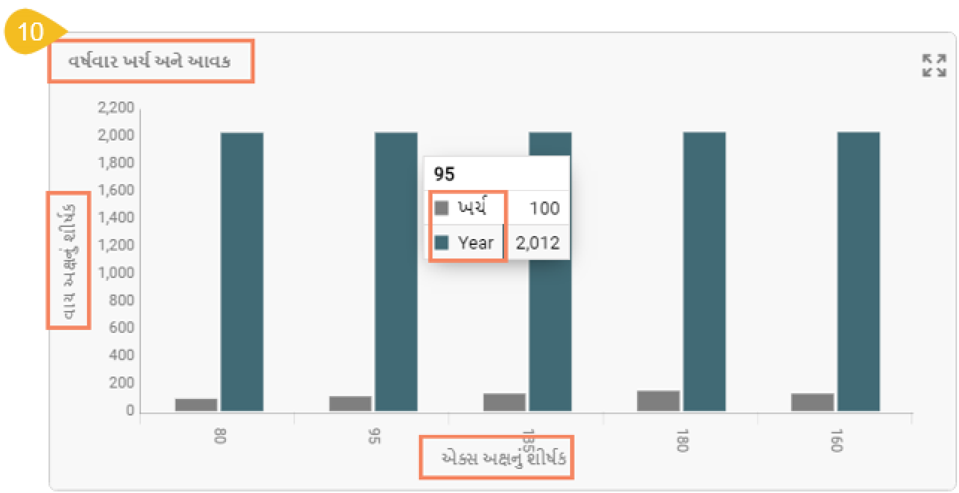
vii) Open the Script window for Component

viii) Make sure that the desired language's name is mentioned in the script.

ix) Click the '**Preview**' icon.



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



Note:

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

b. The users can use the Language Setting functionality for the below given dashboard charting components:

1. Title and Subtitle description
2. X-axis and Y-axis description (second Axis description)
3. Inbuilt Legends, Timeline Legends.
4. Legend component and static legends
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

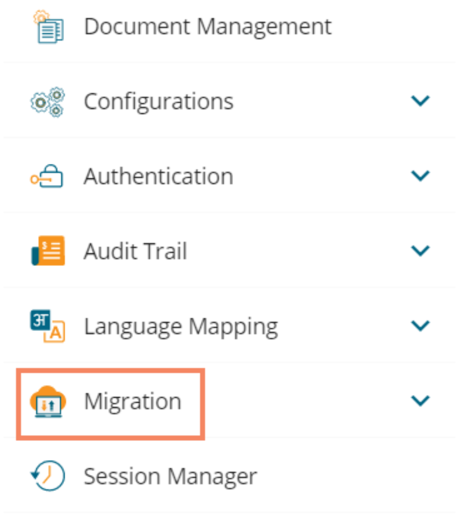
4.2.6. Migration

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

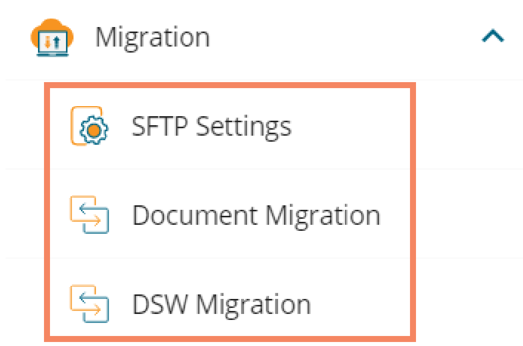
Scripts, and Models to another space. The Migration admin option has two main categories:
1. Document Migration,
2. DSW Migration.

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



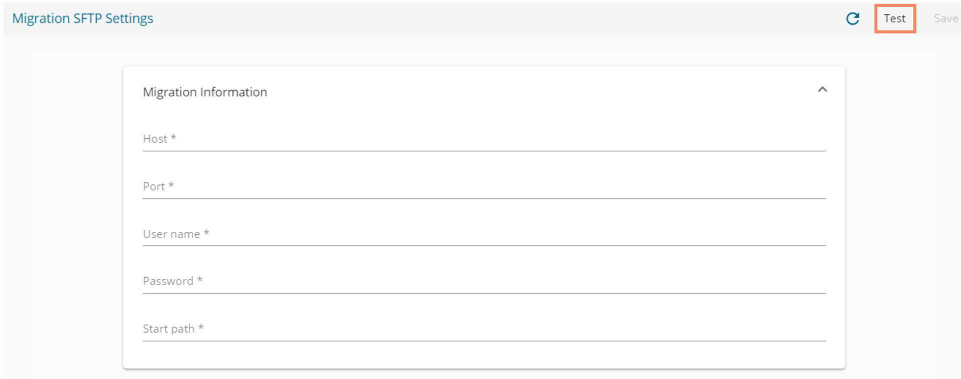
This section explains the step by step process of Migration.

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

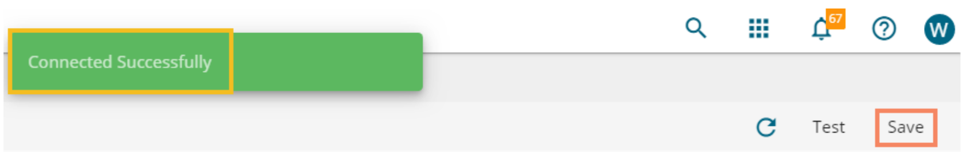
iv) Click the ‘**Test**’ option to verify the connection.



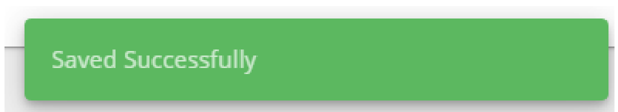
v) A success message appears to confirm the verification of the connection.

vi) The ‘**Save**’ option gets enabled.

vii) Click the ‘**Save**’ option to save the SFTP details.



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



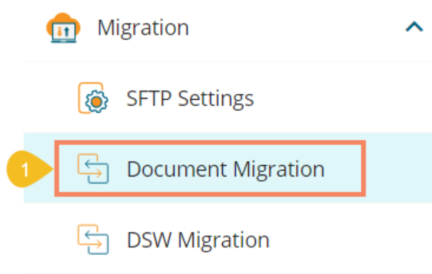
4.2.6.2. Document Migration

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

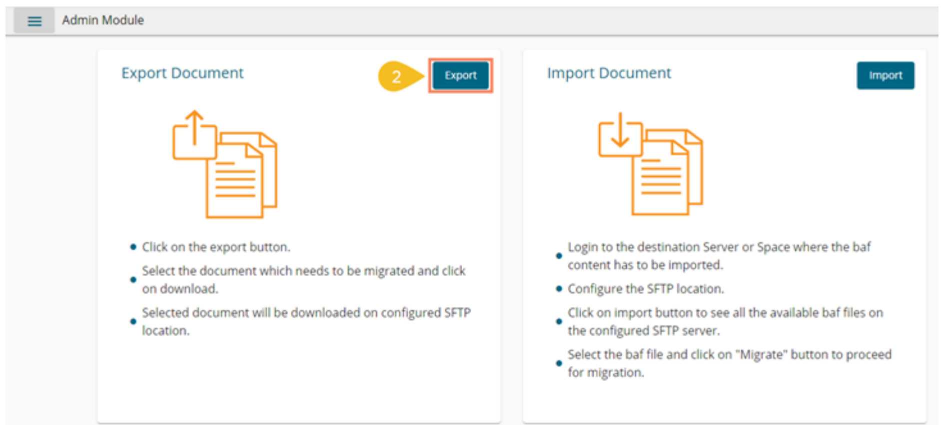
1) Configuring an SFTP Server: the SFTP server location should be similar for import and export accounts.
2) Export: users can select a document from using a source user account and download it to the SFTP server.
3) Import: users need to open this option using a destination user account where the exported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

Steps to migrate a document:

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



ii) Click the ‘**Export**’ option from the next page that opens in the sequence.



iii) A page opens with the list of documents available for export

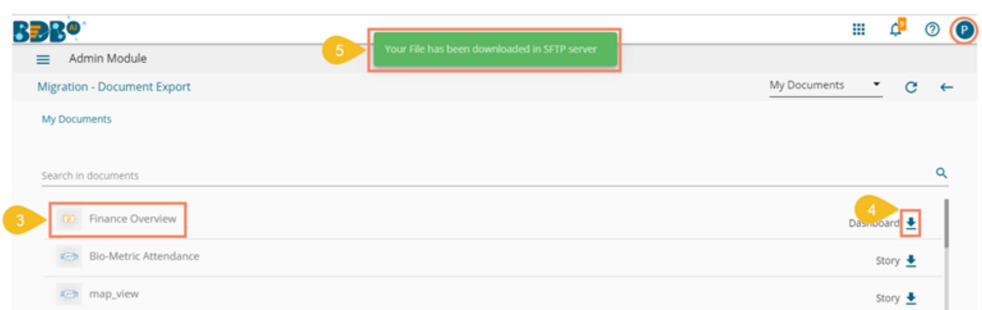
iv) Click the ‘**Download**’ icon for the document (story/dashboard) that you want to export.

Note:

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.

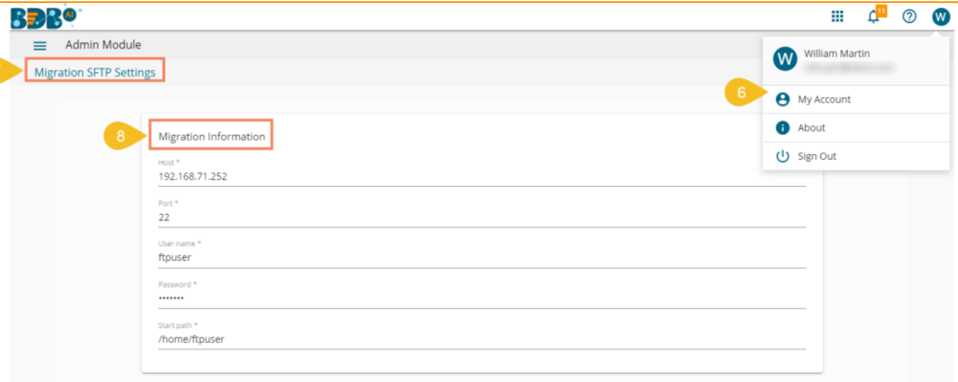
v) A success message appears after the download process to confirm the download of the selected file in the SFTP server.



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.

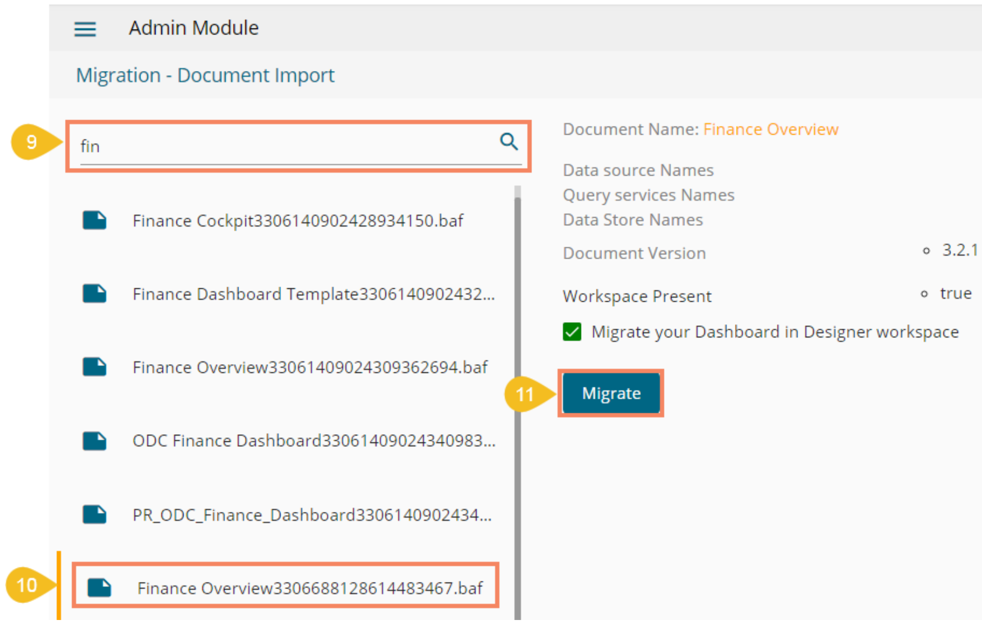
viii) Configure the SFTP location (**SFTP location for the source and destination account should be the same to use the document migration functionality**)



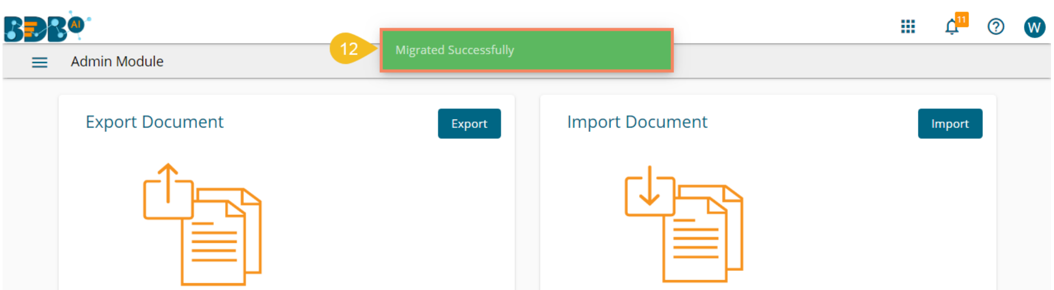
ix) By clicking the '**Import**' button from the Document Migration page.

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.

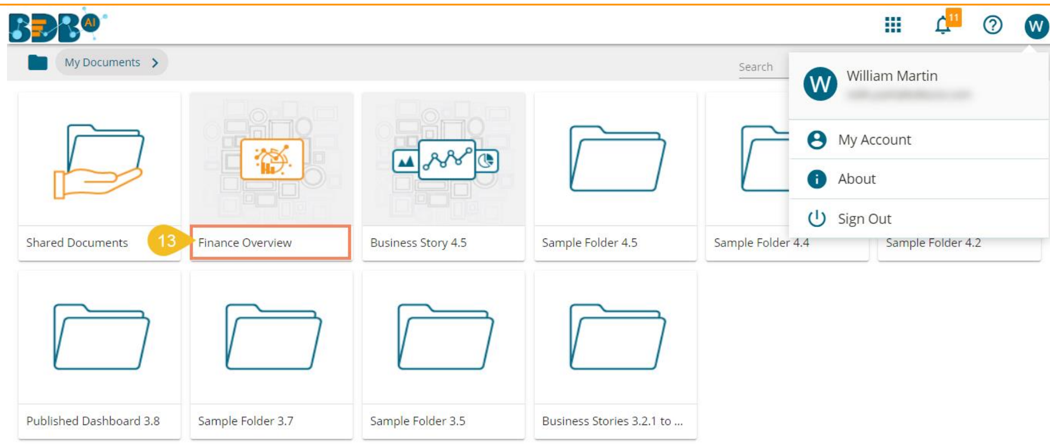
xi) Click the '**Migrate**' option from the right-side panel displaying the document details.



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

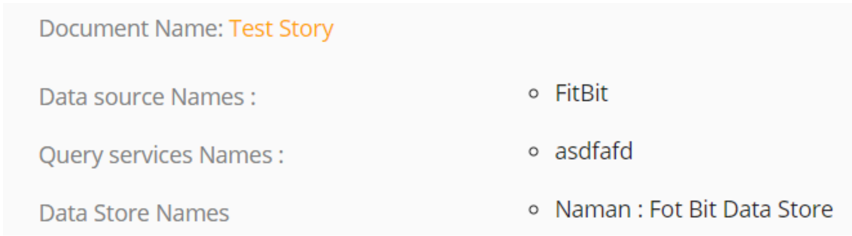


xiii) The migrated document gets displayed on the platform homepage.

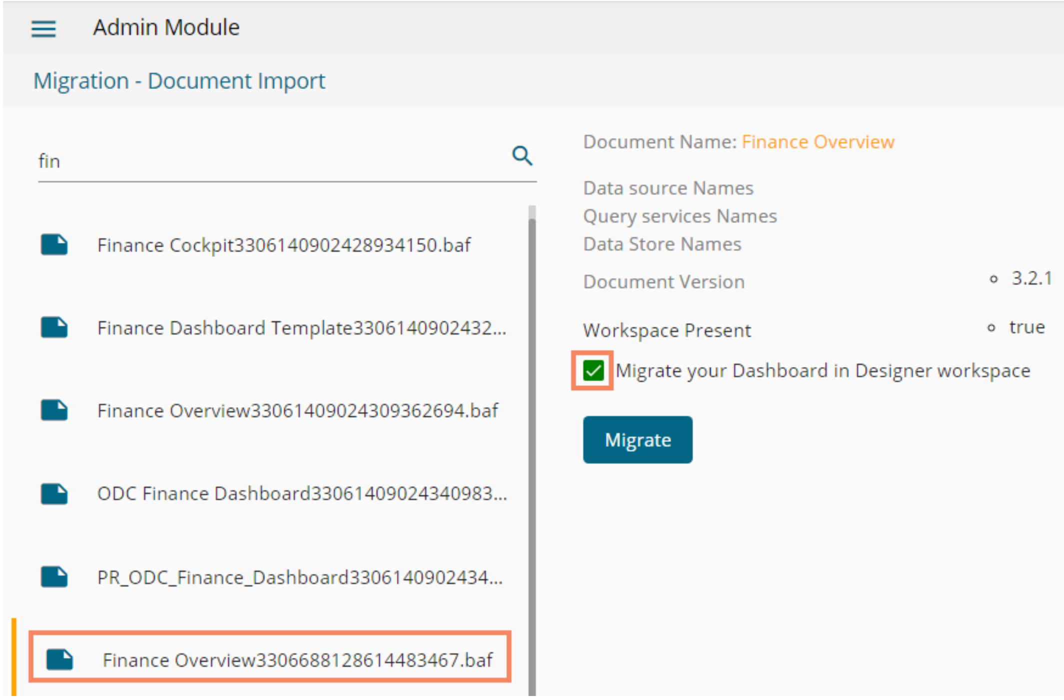


Note:

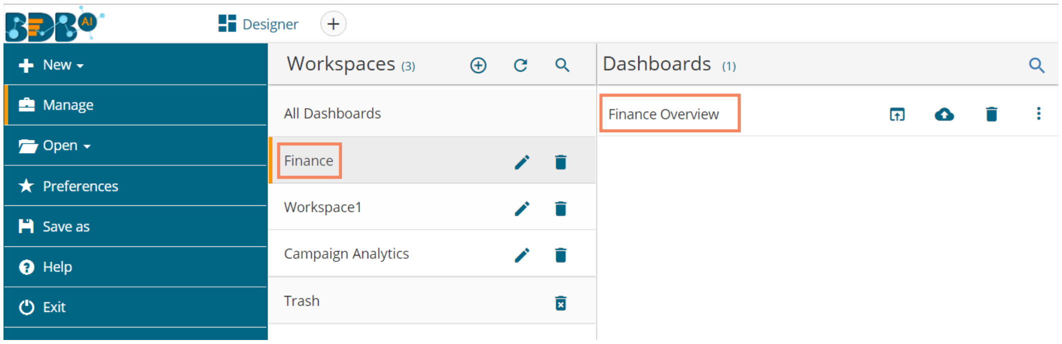
a. If the selected dashboard or story is created based on an RDBMS connector, the data connector details get displayed on the right-side panel. E.g., for the given example of the Test Story document, the following details of data source names, query service names, and data store names are displayed.



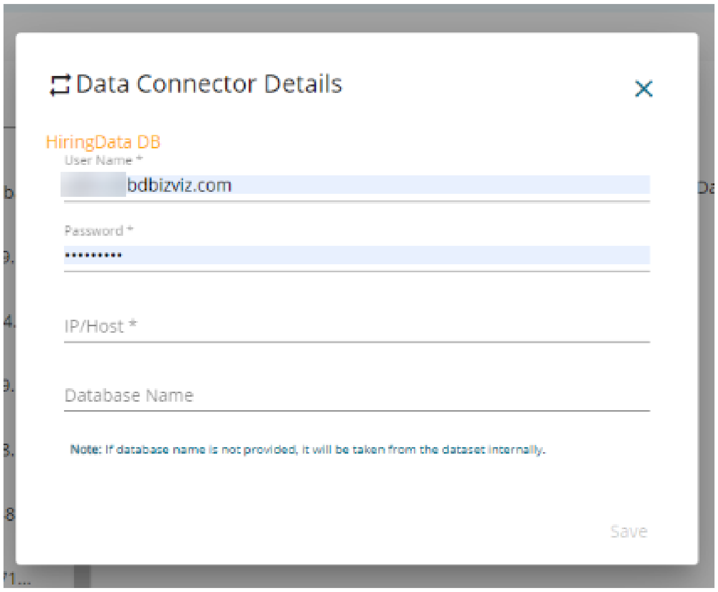
b. Users can also migrate the imported dashboard in the Designer workspace by using a checkmark in the given box (as shown in the following image):



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



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



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

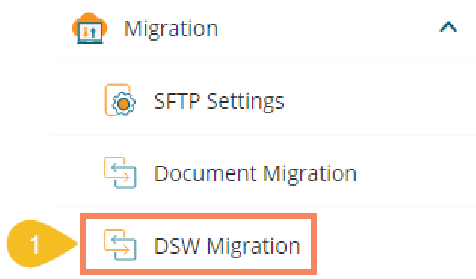
d. Dashboards and Stories using the API data connectors/data sets or File as data connectors don't require to provide the Connector details for document migration.

4.2.6.3. DSW Migration

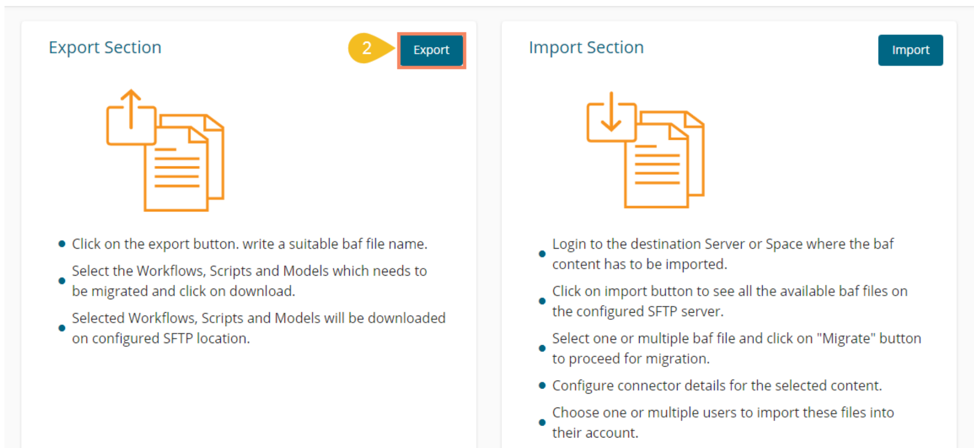
The DSW Migration option allows users to migrate Data Science Workflows, Script, and model.

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.

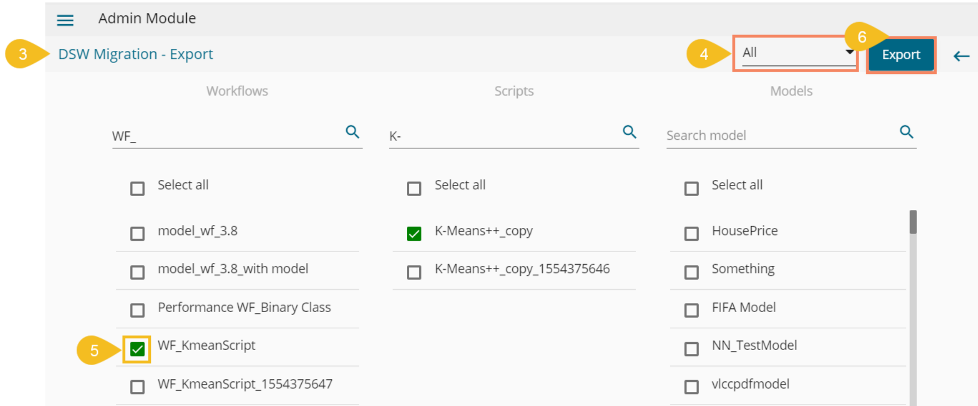
i) Click the '**DSW Migration**' option from the Migration drop-down.



ii) Click the ‘**Export**’ option from the next screen.

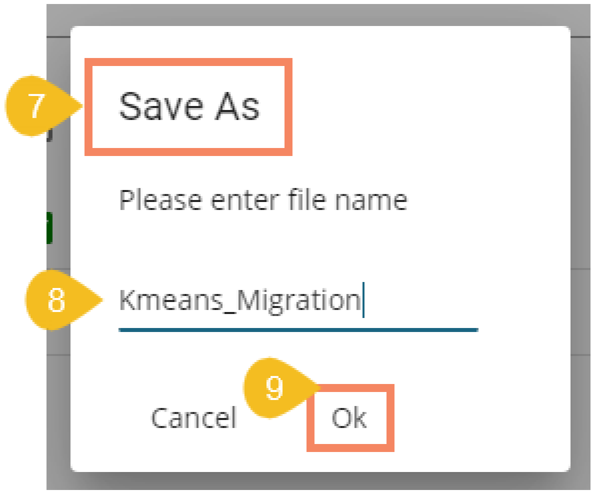


iii) The Export Section for DSW Migration opens.
iv) Select a Data Science Workspace to display the list of Workflows (By selecting ‘**All**’ option workflows from all the Data Science workspaces display)
v) Select the Workflow(s), Script(s), or Model(s) using the respective lists (If the selected workflow 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.



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

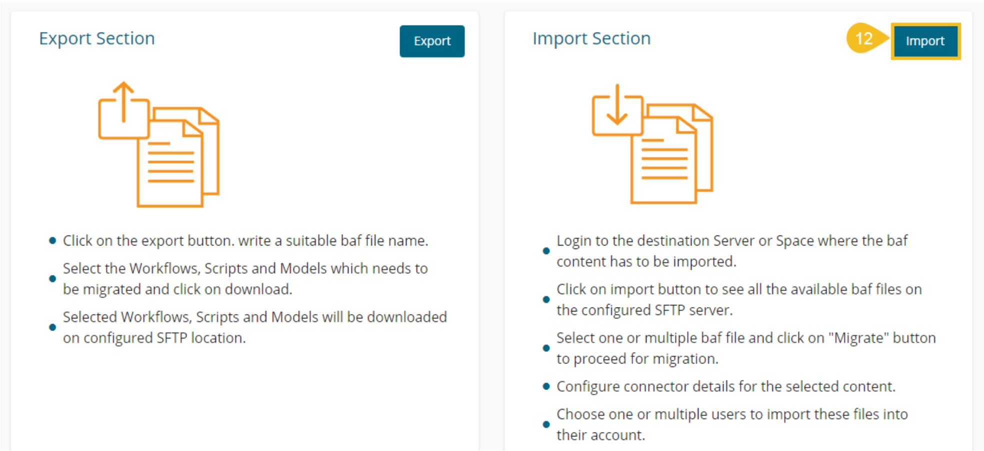
vii) The ‘**Save As**’ window opens.
viii) Provide the file name.
ix) Click the ‘**Ok**’ option.



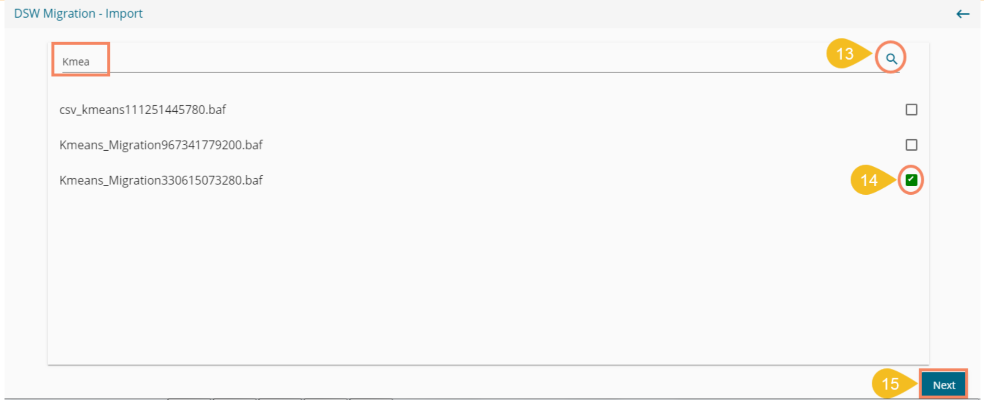
x) A notification message appears to inform the user that the file has been successfully downloaded in the SFTP server.

xi) The user needs to login to the destination user account.

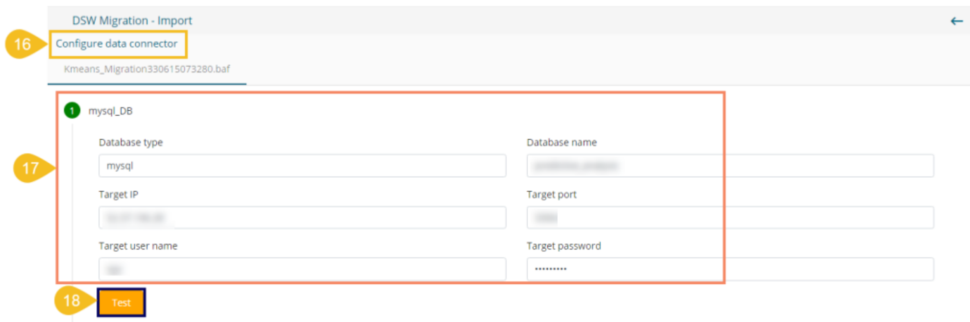
xii) Click the '**Import**' option using the DSW Migration admin option.



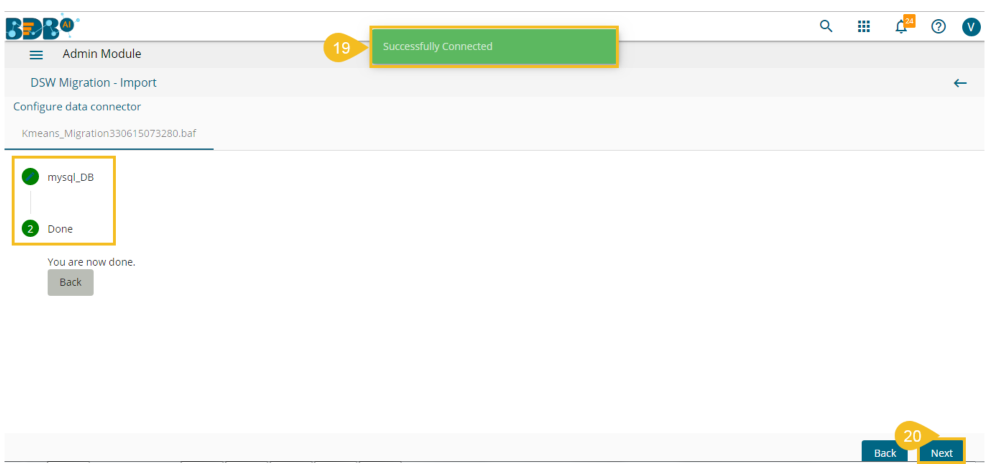
xiii) Search for the created BAF file.
xiv) Select it by using the checkmark in the box.
xv) Click the '**Next**' option.



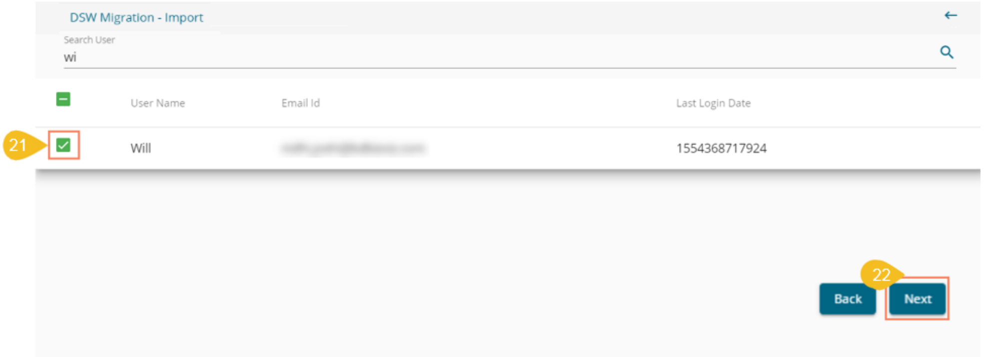
xvi) The Data Connector Configuration page opens (only for the Workflows created using RDBMS-MySQL, MSSQL, Oracle data source).
xvii) Configure the Data Connector details.
xviii) Click the '**Test**' option.



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).

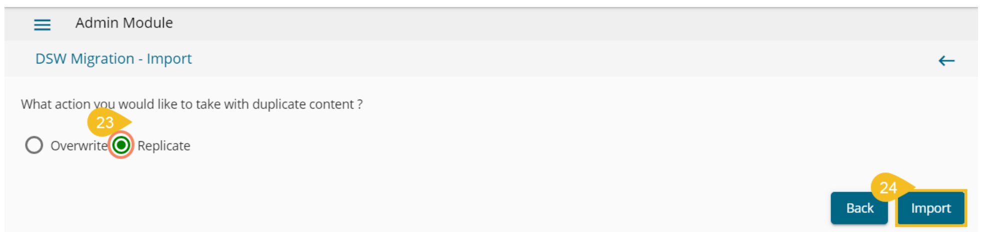


xxi) The user gets redirected to select a destination user. Select a user/users by putting the checkmarks from the displayed list.
xxii) Click the '**Next**' option to proceed.

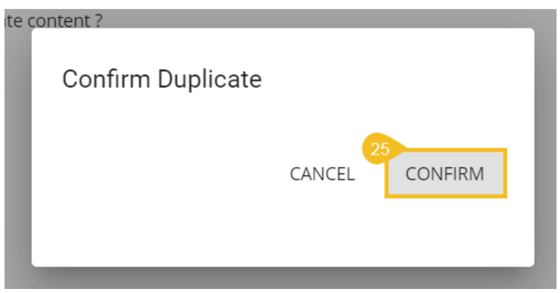


xxiii) Select an option out of Overwrite and Replicate to treat the duplicate content (if in case it happens to be duplicate).

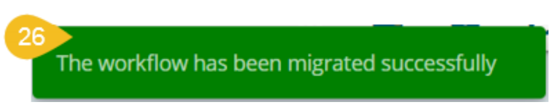
xxiv) Click the '**Import**' option.



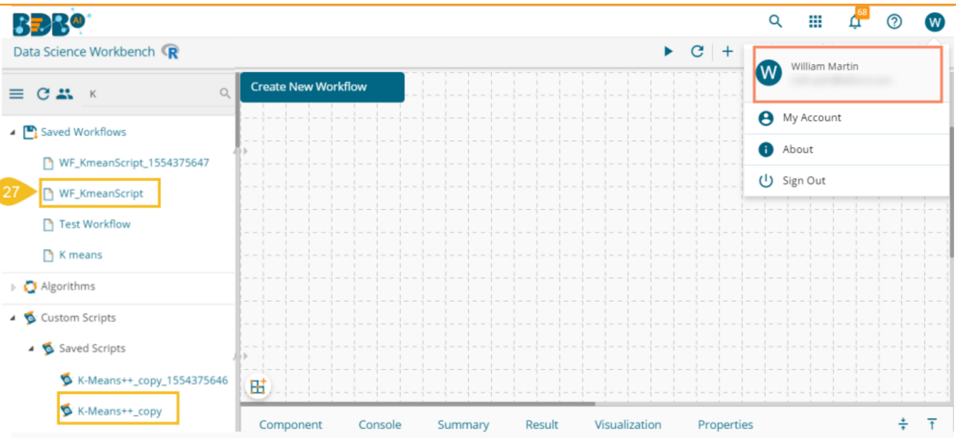
xxv) A confirmation message appears.



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.

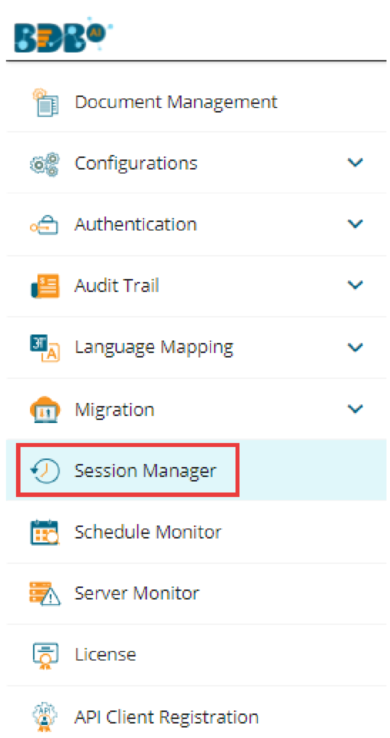


Note: The user can click the '**Back**' icon to go on the previous screen.

4.2.7. Session Manager

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

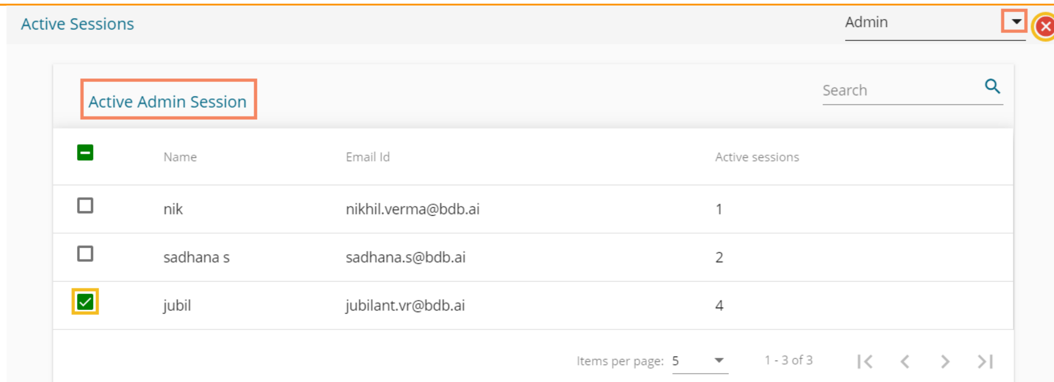
i) Click the '**Session Manager**' option from the list of Admin options.



ii) The '**Active Sessions**' page opens, displaying the Active Admin Sessions by default.

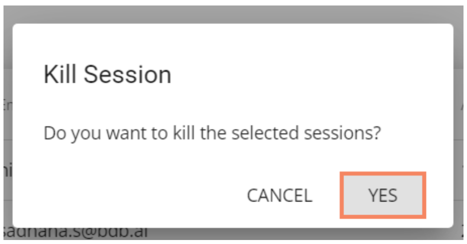
iii) Select a user by using the checkbox provided next to any username.

iv) Click the '**Kill Session**' icon.



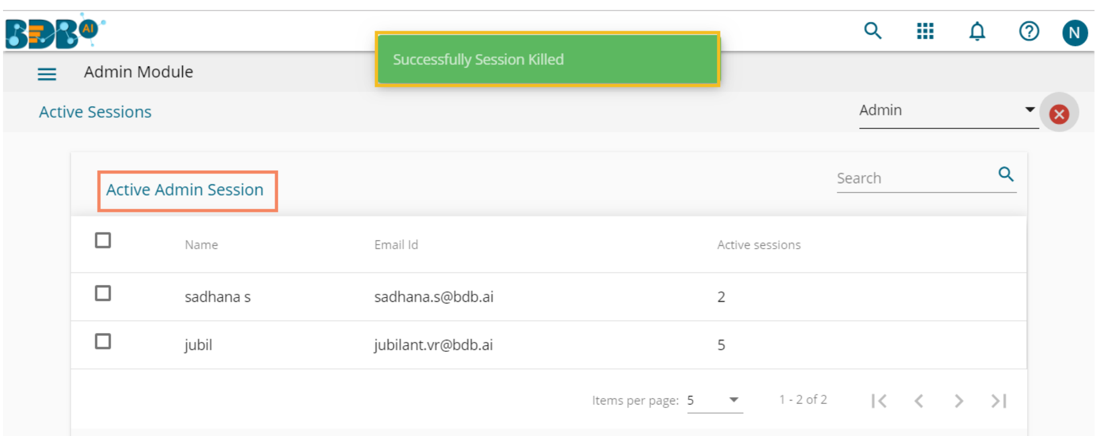
v) A window appears to confirm the action.

vi) Click the ‘**YES**’ option.



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.

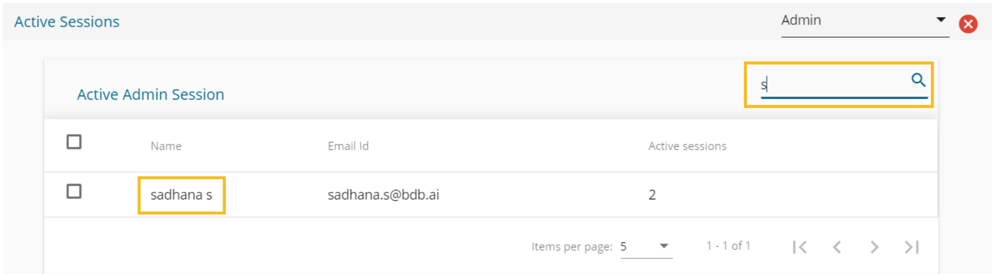


Note:

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:

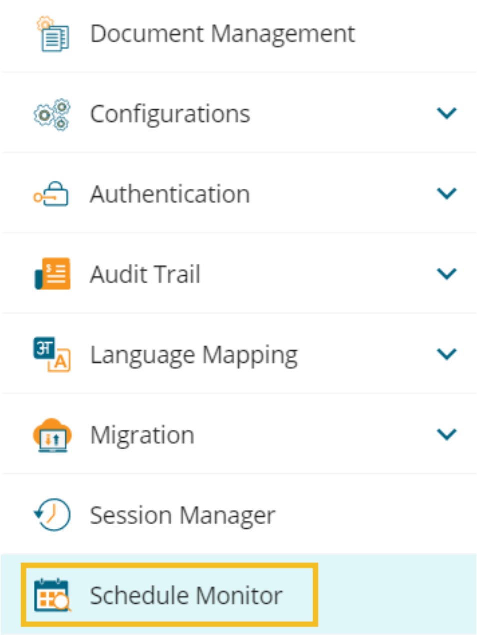
d. Use the **'Search'** bar to search a specific user(s) from the displayed list of Active Sessions.



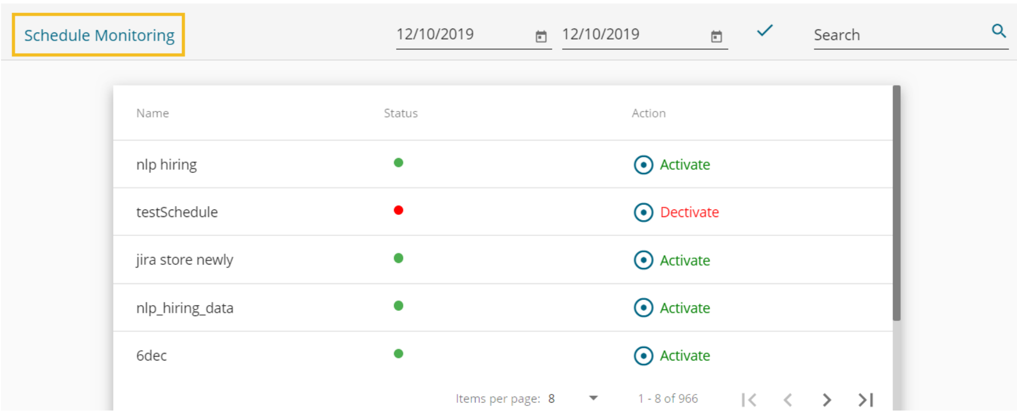
4.2.8. Schedule Monitor

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

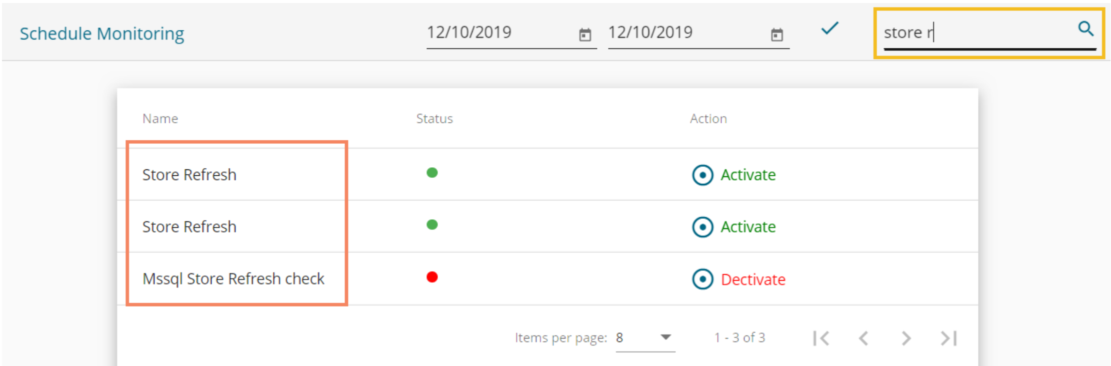
i) Click the '**Schedule Monitor**' option from the list of admin options.



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



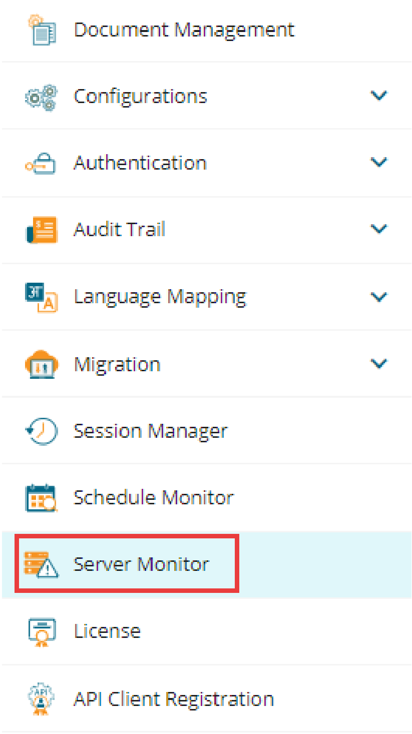
iii) Search and display specific scheduled data store(s) using the '**Search**' space.



4.2.9. Server Monitor

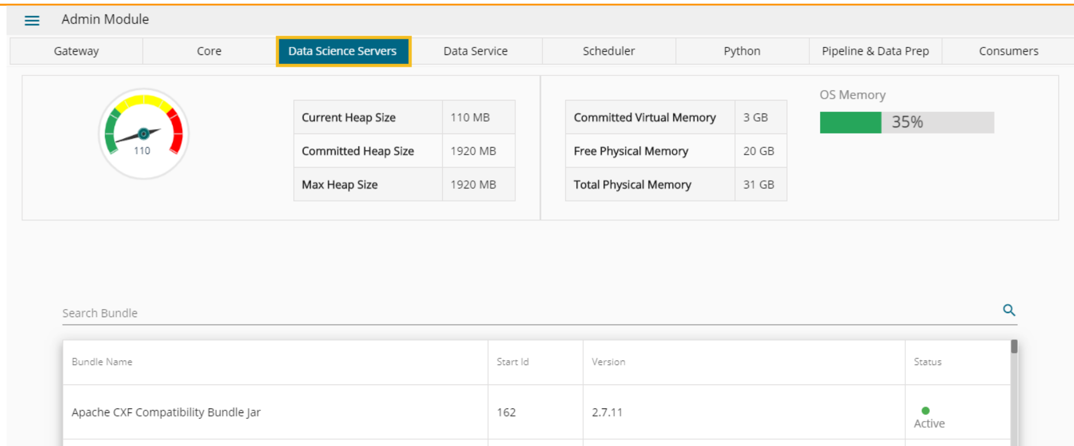
Server monitor reviews and analyzes a server for availability, operations, performance, security, and other operations-related processes. The server administrators perform server monitoring to ensure that the server is performing as expected.

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.

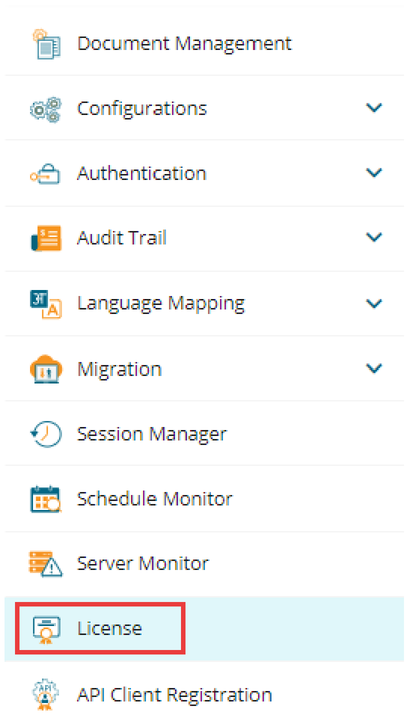
iii) Select a node to display the node-specific server details. E.g., the Data Science Servers node is selected in the below given details:



4.2.10. License

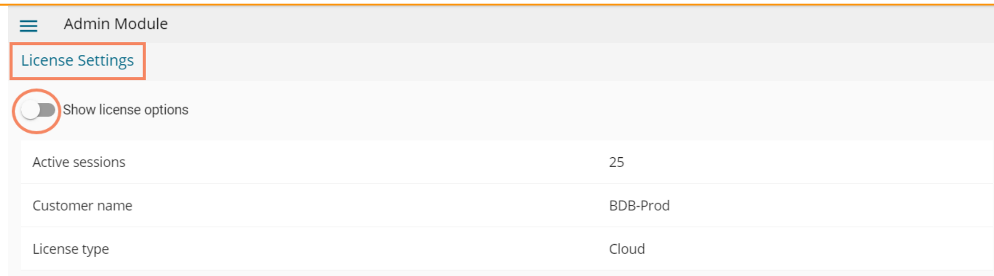
The License admin option provides information about the user license and allows the administrator to perform the License related settings with the help of the BDB support team.

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



ii) The License Settings page opens displaying the active session with customer name and product type.

iii) Enable the '**Show License Options**' using the radio button to update the License Users.

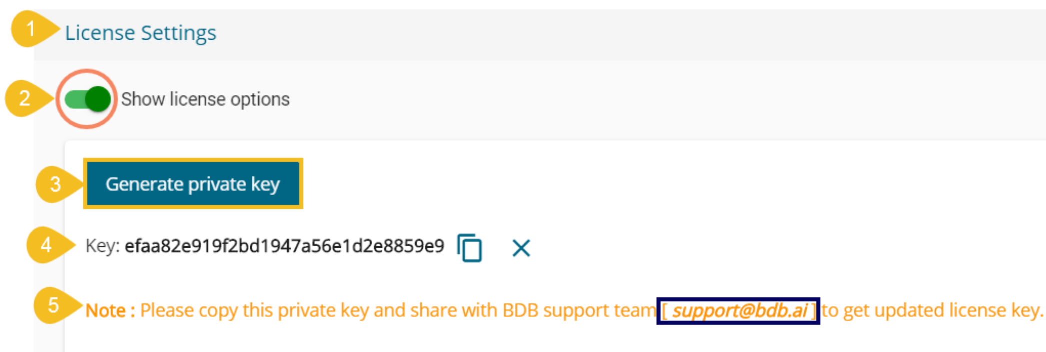


Note: After enabling the '**License Settings**' radio button, the following options appear on the page:

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**' icon to copy the Private Key.

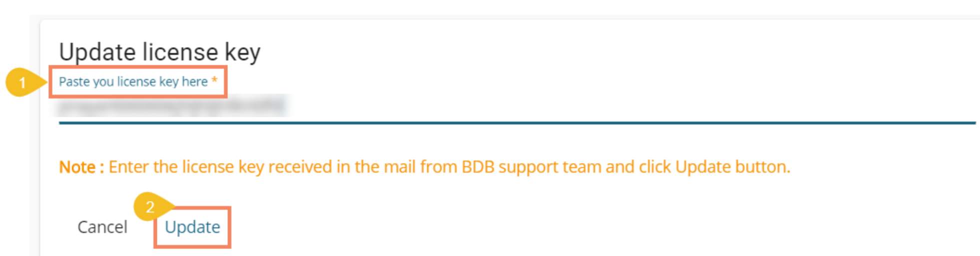


Note: Click the '**Cancel**' option to remove the generated private key.

b. Update License

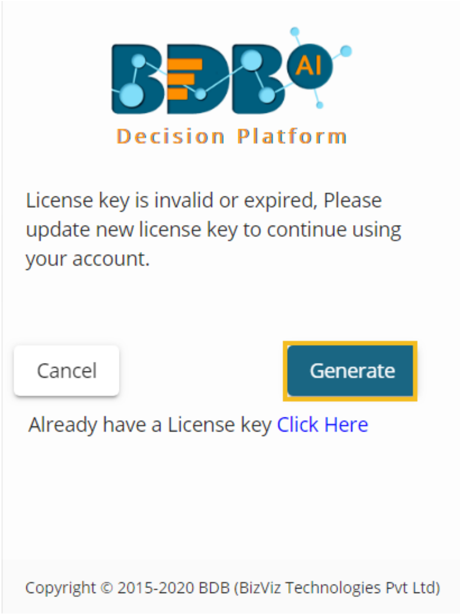
Once the user shares the generated private key with the support team of BDB, the support team sends them the license key via email.

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

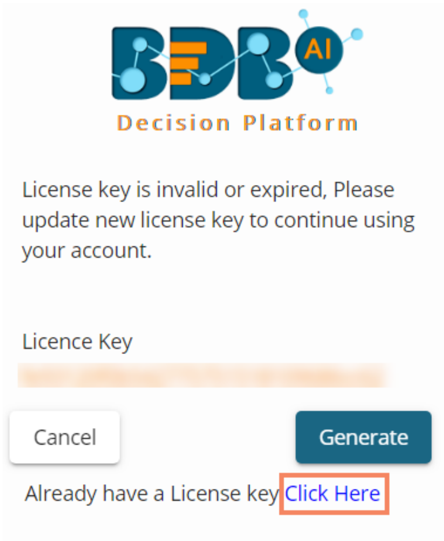


Note: The same workflow of License options is provided on the BDB Platform login page to facilitate the new users and the (existing) users who wish to renew their expired licenses with BDB.

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.



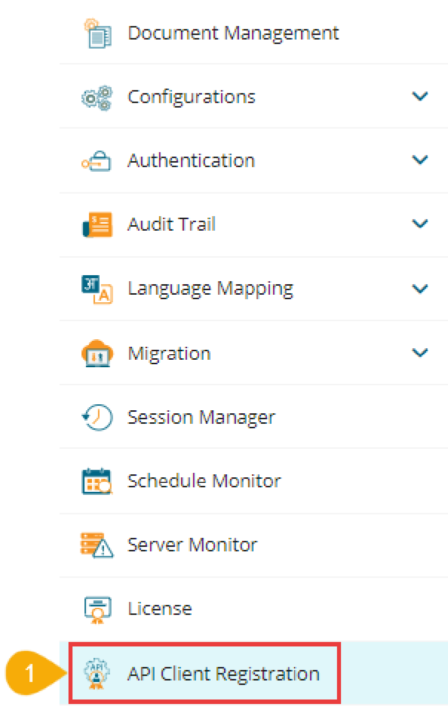
2. Choose the '**Click Here**' option, if you have already received the License key from the BDB support team.



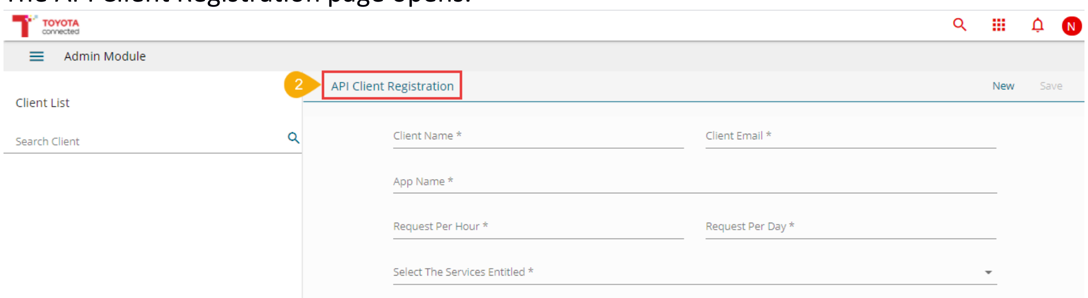
4.2.11. API Client Registration

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.

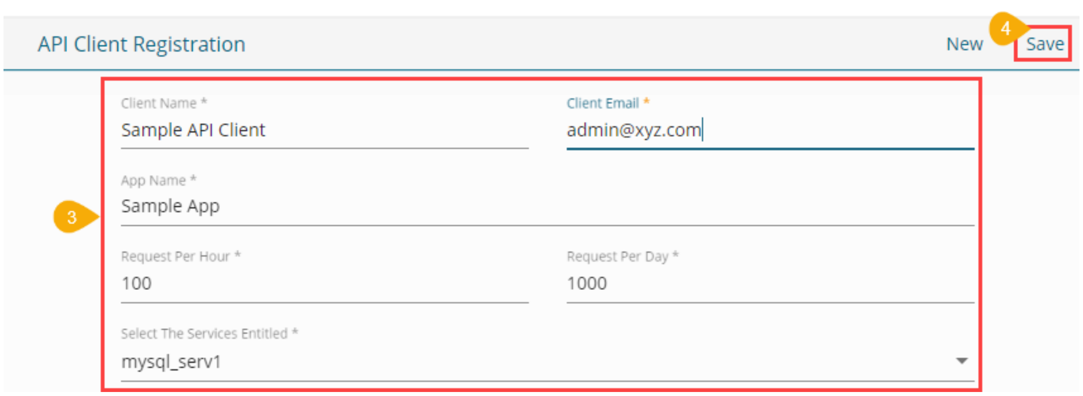
i) Navigate to the '**API Client Registration'** option from the Administration panel.



ii) The API Client Registration page opens.

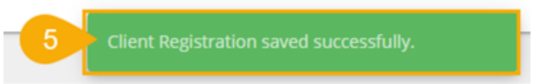


iii) Provide the required details of the API Client for registration.
iv) Select the entitled services from the drop-down menu.
v) Click the '**Save**' option.

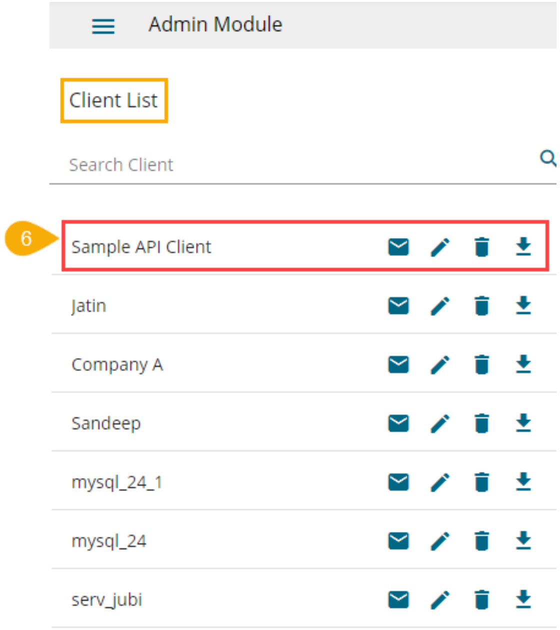


Note: The '**Select the Services Entitled'** will display the data sets published as service using the '**Data Center**' module of the platform.

vi) A notification message appears.



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

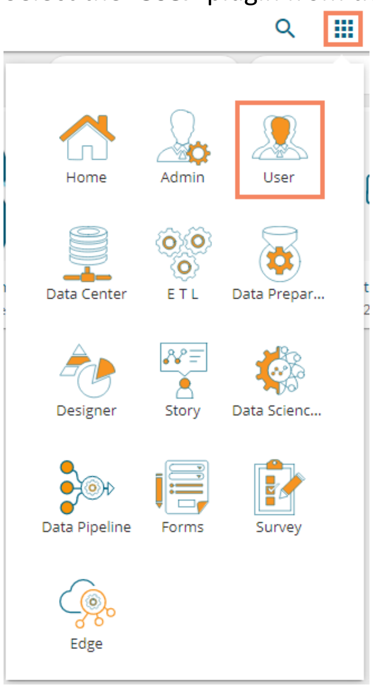


5. User Management

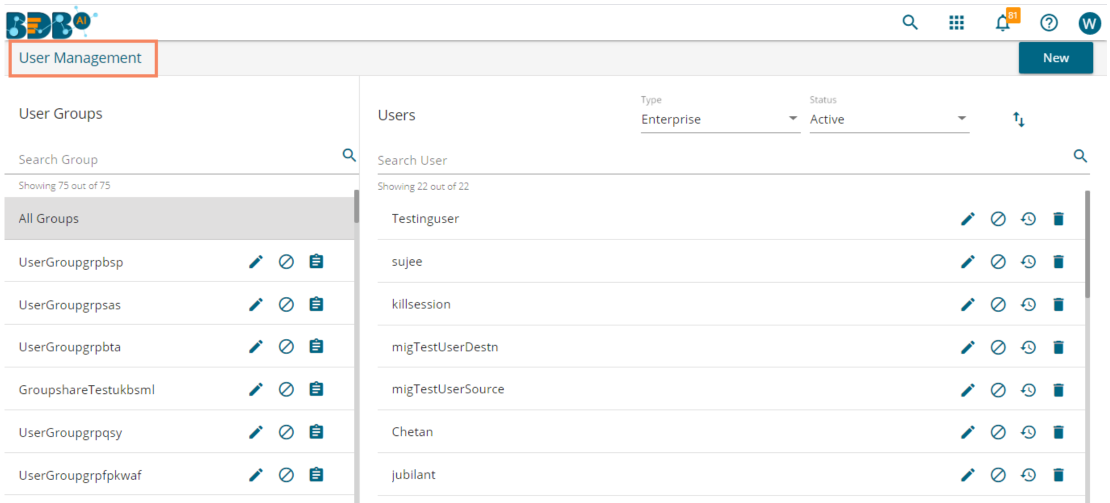
This section describes how to create a user or user group in the BDB Platform. A newly formed user must be added to a user group to access the various platform application.

5.1. Accessing the User Management Page

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



ii) The User Management landing page opens.



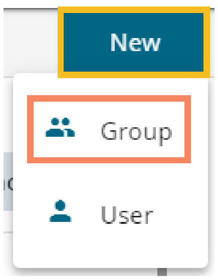
Note: The admin can search for a specific user or group by using the '**Search**' options.

5.2. Creating a New User Group

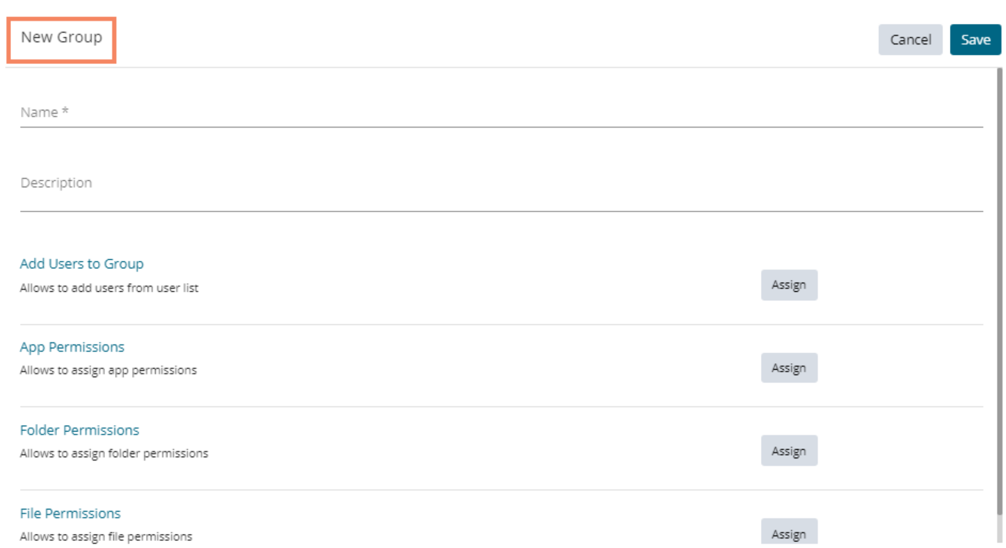
i) Click the '**New**' option.

ii) A context menu opens.

iii) Select the '**Group**' option from the context menu.



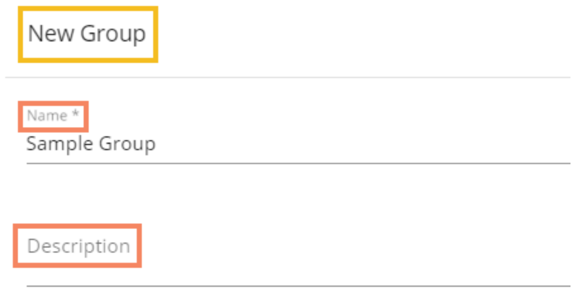
iv) A new window opens asking for information about a new group.



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)

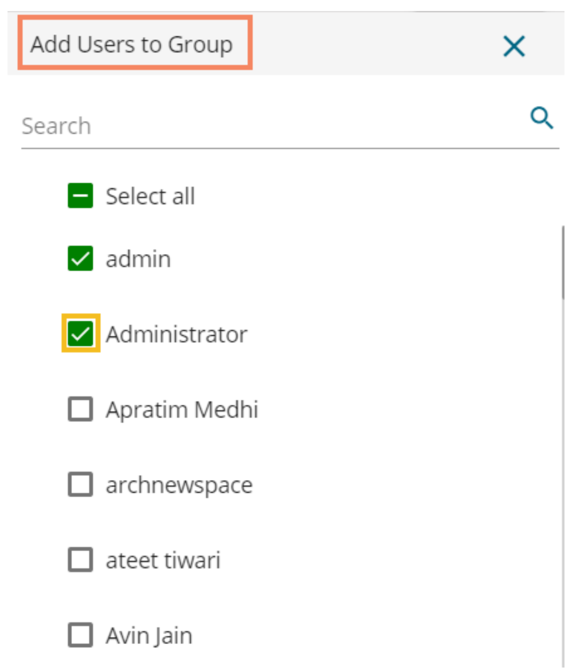


c. **Add User to Group**:

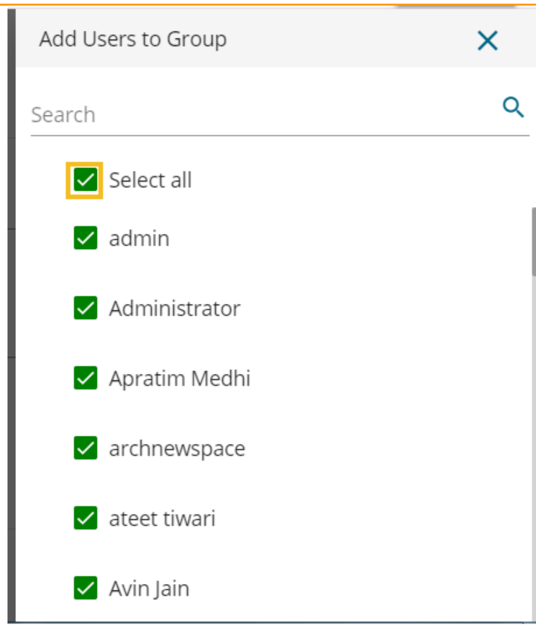
i. Click the '**Assign**' option provided for adding the existing users to the newly created group.

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.



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

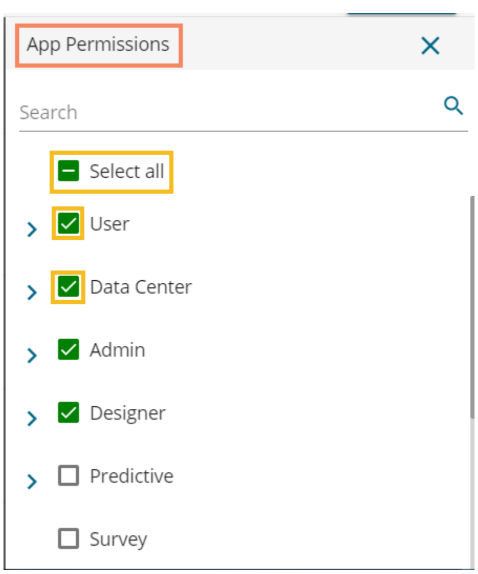


d. **App Permission**:

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

ii. A new window opens with the list of the available apps to select the App Permissions.

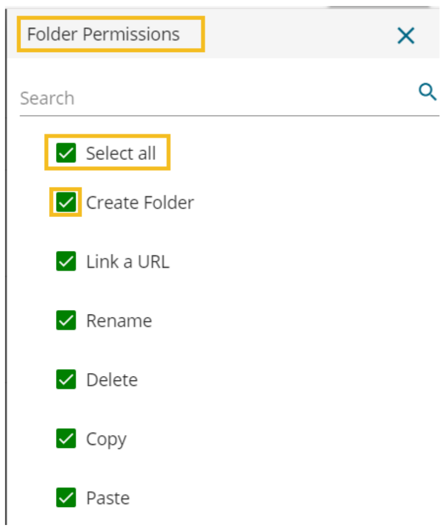
iii. Either choose '**Select all**' options to add all the permission or Assign various plugin/app rights by choosing a specific plugin option to the newly created User Group via the '**Group Permissions**' menu list (It is mandatory).



e. **Folder Permission**:

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

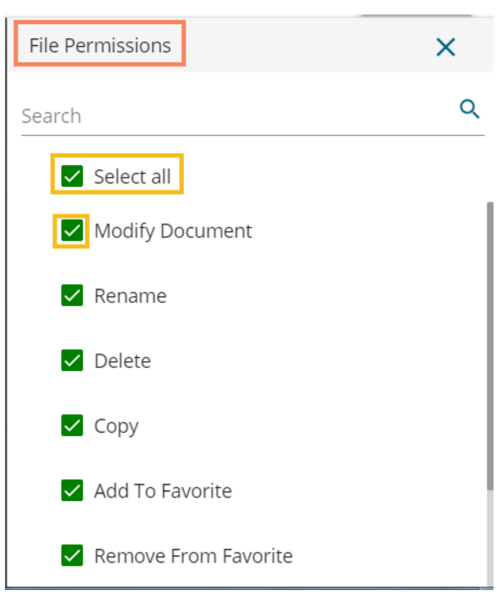
ii. A new window opens with the list of the Folder Permissions to be selected for the group.



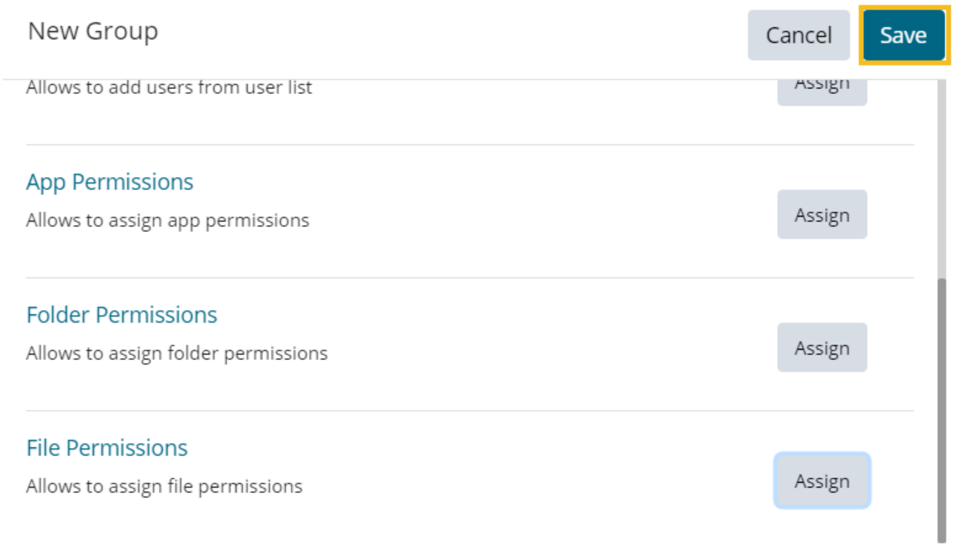
f. File Permissions:

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

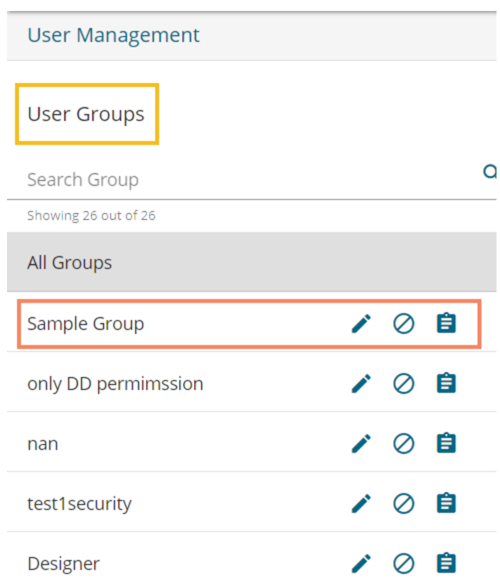
ii. A new window opens with the list of the File Permissions to be selected for the group.



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



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

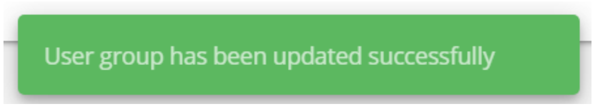


Note:

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

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

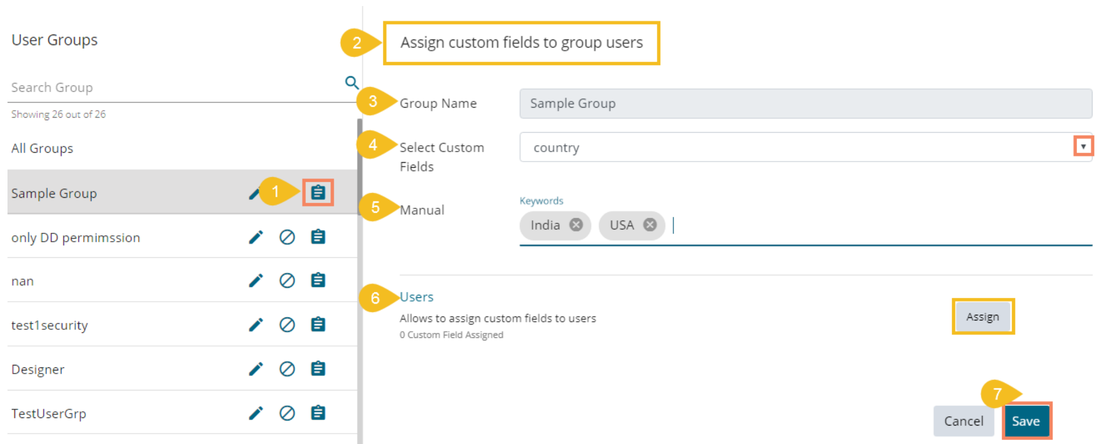


i) The concerned group gets created with the selected permissions.

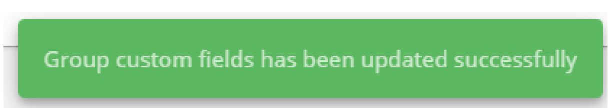
5.2.1. Assigning Group Custom Fields

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

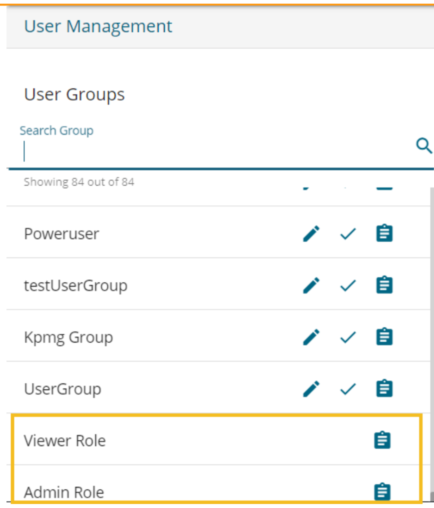
i) Click the '**Assign Custom Field**' option provided next to a user group.
ii) The '**Assign Custom Field to Group Users**' page opens.
iii) Select a Custom Field using the drop-down list.
iv) The '**Manual**' field appears to insert the Keywords for the selected custom field.
v) Click the '**Add**'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



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

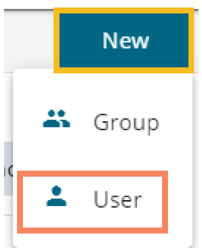


Note: The default user groups do not have the '**Edit**' and '**Block**' icons –E.g., Admin Role and Viewer Role.

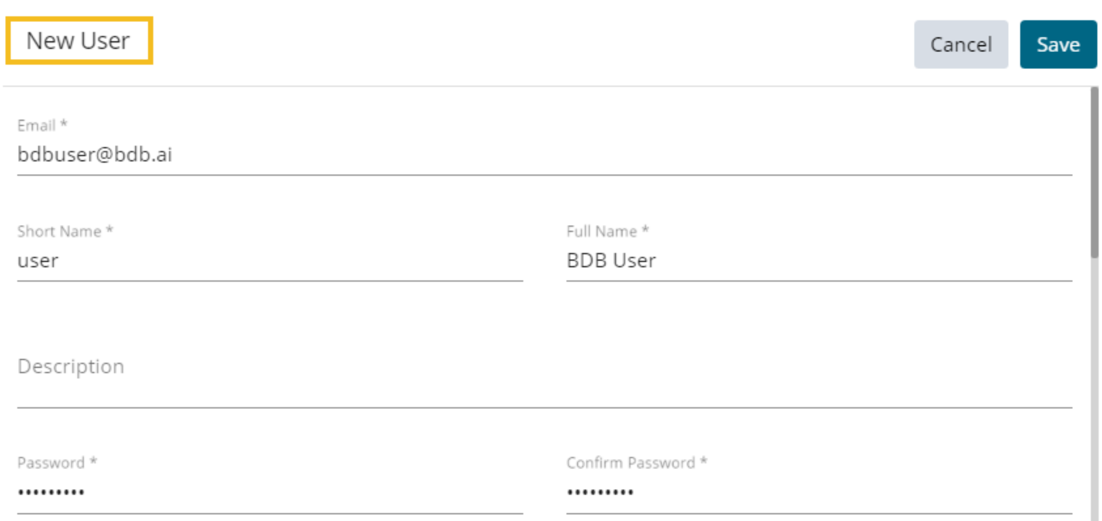


5.3. Creating a New User

i) Click the ‘**New**’ option.
ii) A context menu opens.
iii) Select the ‘**User**’ option from the context menu.



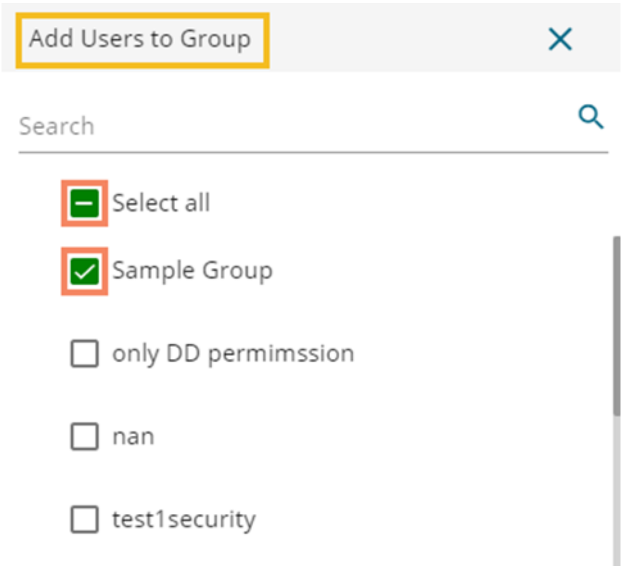
iv) The ‘**New User**’ form opens.
v) Fill in the following information to create a new User:
   a. **Email:** Email address
   b. **Short Name:** Short name of the user
   c. **Full Name:** Full name of the user
   d. **Description:** Describe the user (optional)
   e. **Password:** Set password for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



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

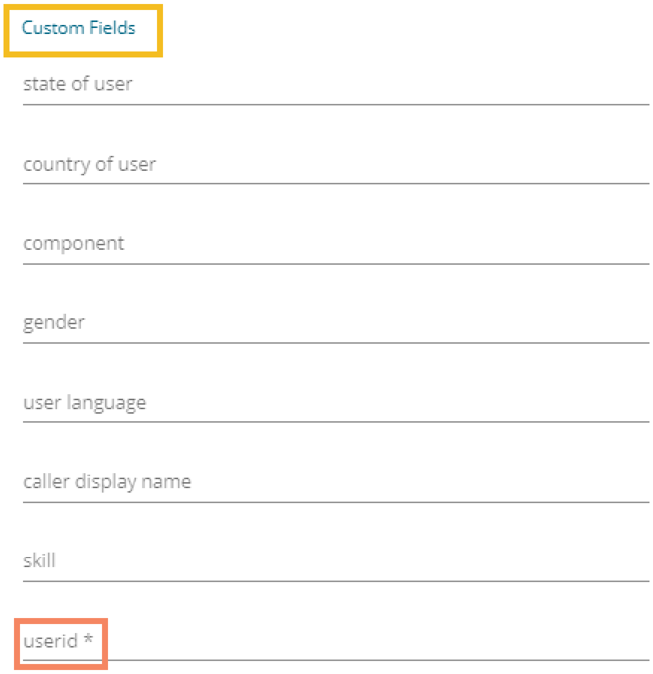
vii) A window opens, listing all the groups.

viii) Either choose the '**Select all**' option or select the specific group(s) by using the checkmarks.



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

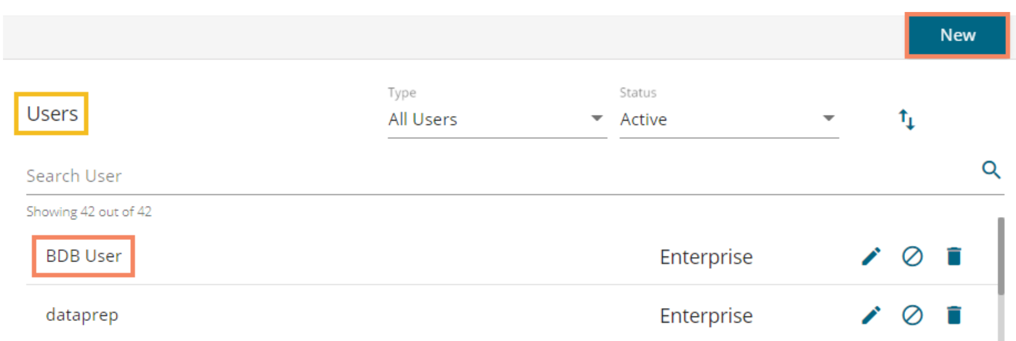
x) Preconfigured custom fields display in this form. The users need to provide the required details using the custom fields if marked as mandatory (A user gets group-specific custom fields).



xi) Click the '**Save'** option

xii) A success message appears.

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



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

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

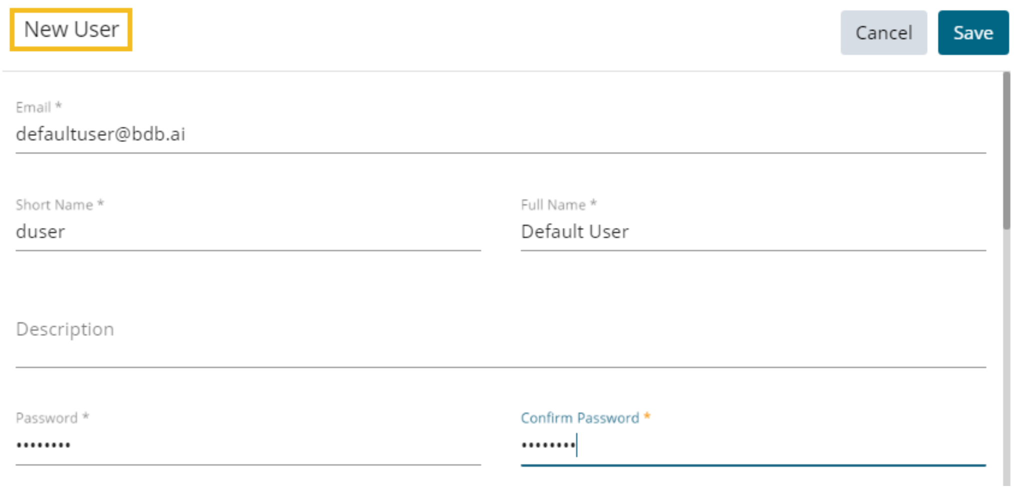
Note:

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

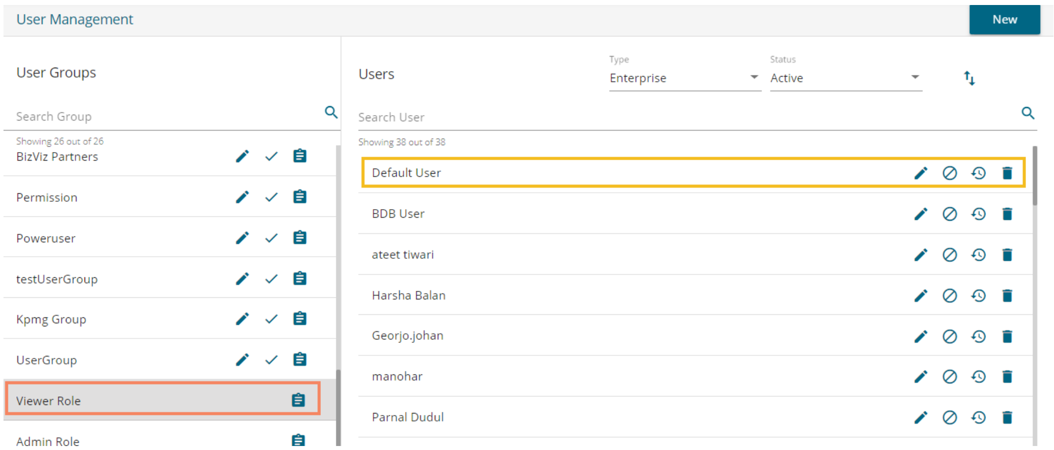
5.3.1. Default User Role

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

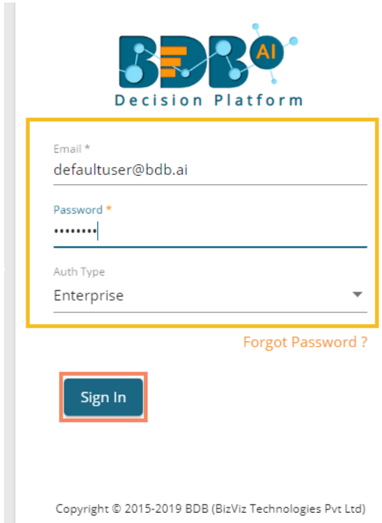
i) Select the '**User**' option from the '**New**' context menu.
ii) The '**New User**' form opens.
iii) Provide the required information to create a new user.



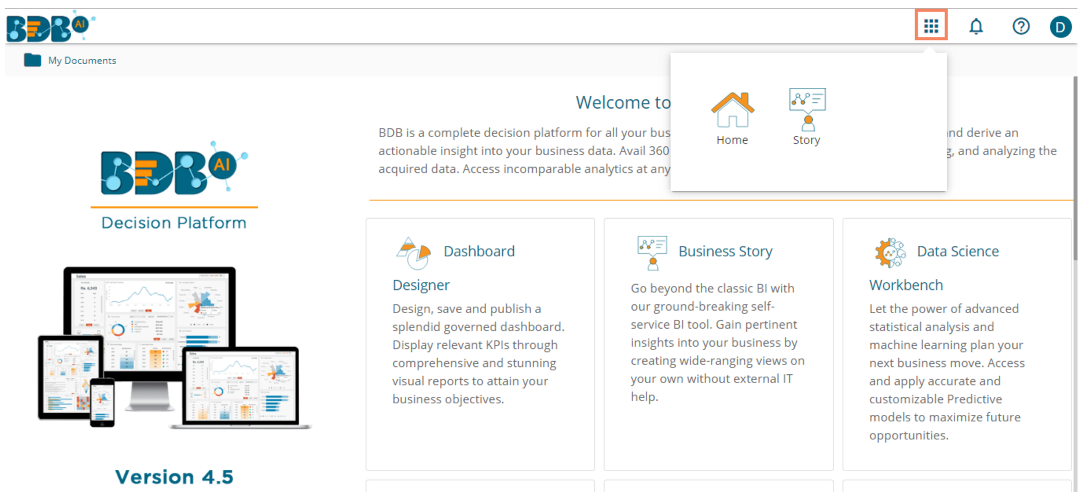
iv) Do not add the user to any group.
v) Provide the '**Custom Fields**' details for the new user (If marked as mandatory).
vi) A success message appears.
vii) The user gets created and added to the list of users (By default the newly created user is added to the Viewer Role User Group).



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



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



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

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

5.4. User Status

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

i) Navigate to the User Management page.

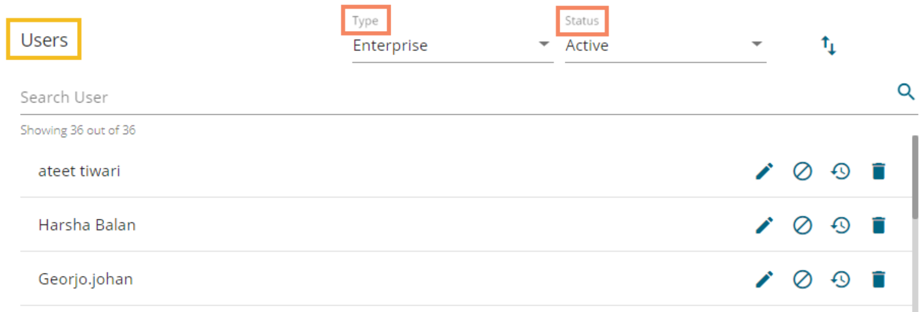
ii) Users can see two drop-down menus.

  a. **Type**: It contains the following authentication types as drop-down options

    i. Enterprise

ii. Window AD
iii. CA PPM

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



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

5.4.1. Activating an Expired User Account

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

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

6. Data Center

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.

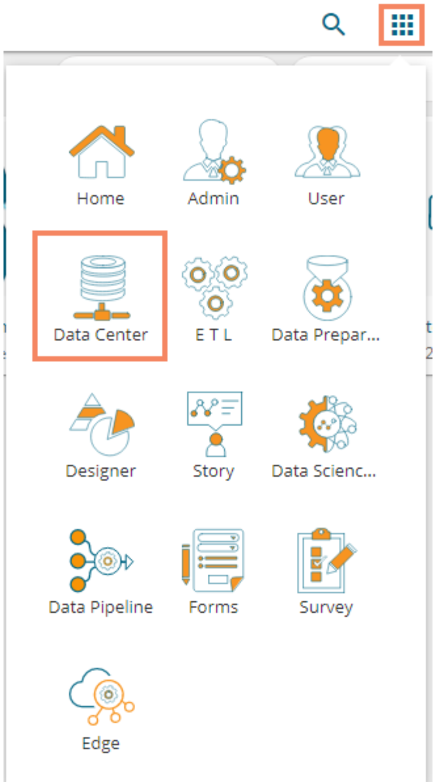
This section explains how to connect with multiple databases to create data service and elastic search-based Data Store. It also describes steps to create datastore metadata.

6.1. Data Connector

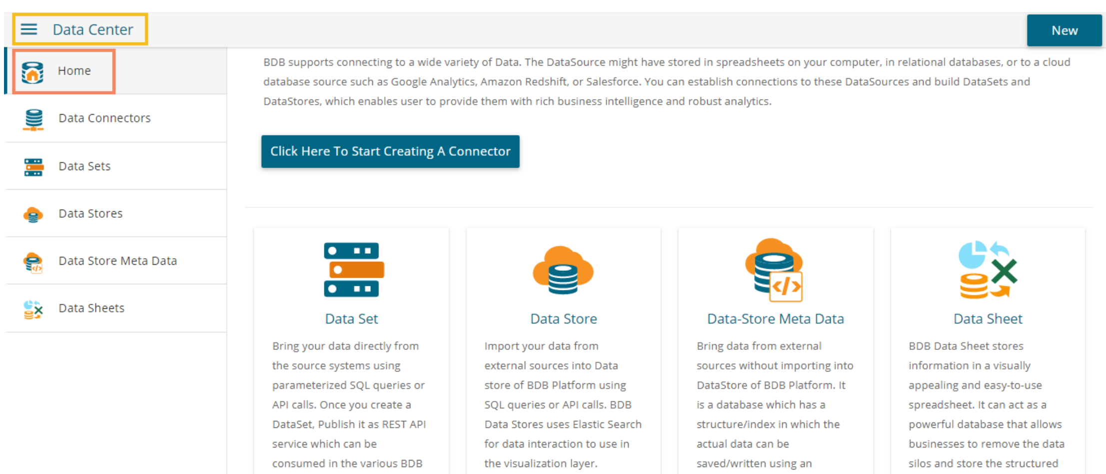
BDB provides native connectors that are built and optimized for those types of data. The BDB users can use these native connectors to connect to their data. The users may need to provide different information for each data connection as per each specific type.

6.1.1. Creating a Data Connector

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



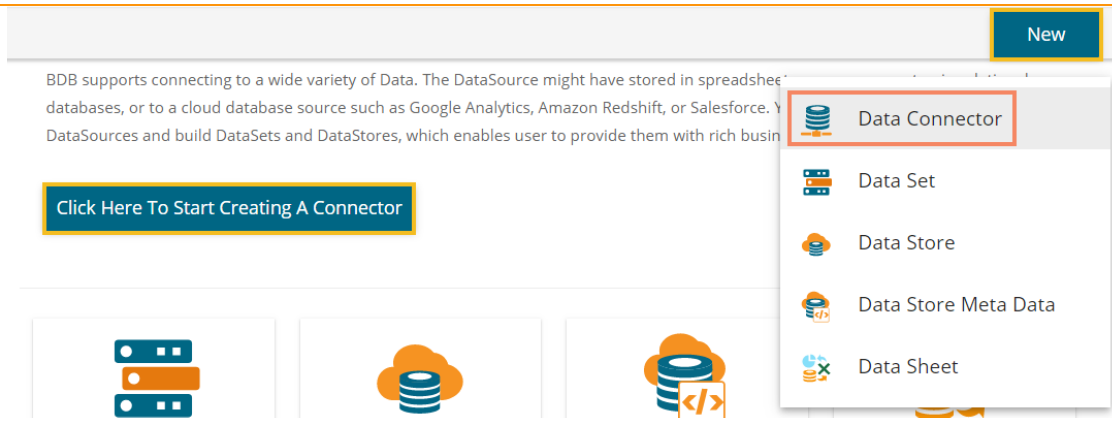
ii) The Data Center homepage opens.



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).

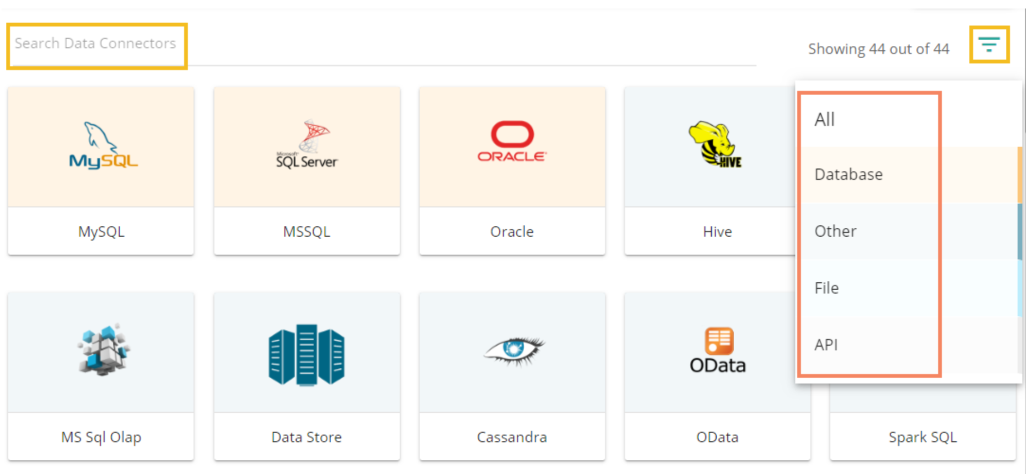


iv) A page opens with all the available data connector types.

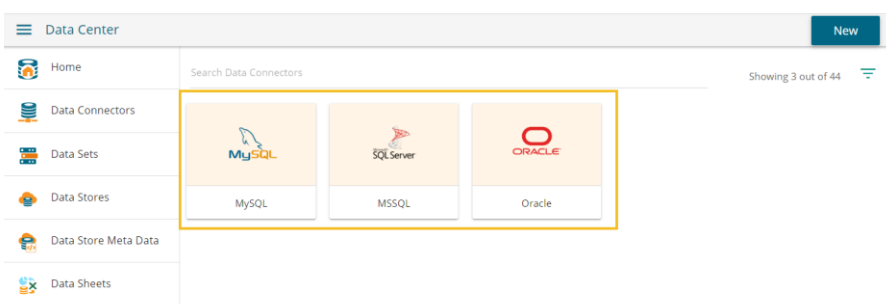
v) The user can search a specific connector type using the '**Search**' bar (E.g., MYSQL)
or

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

vi) Select a category from the displayed menu.



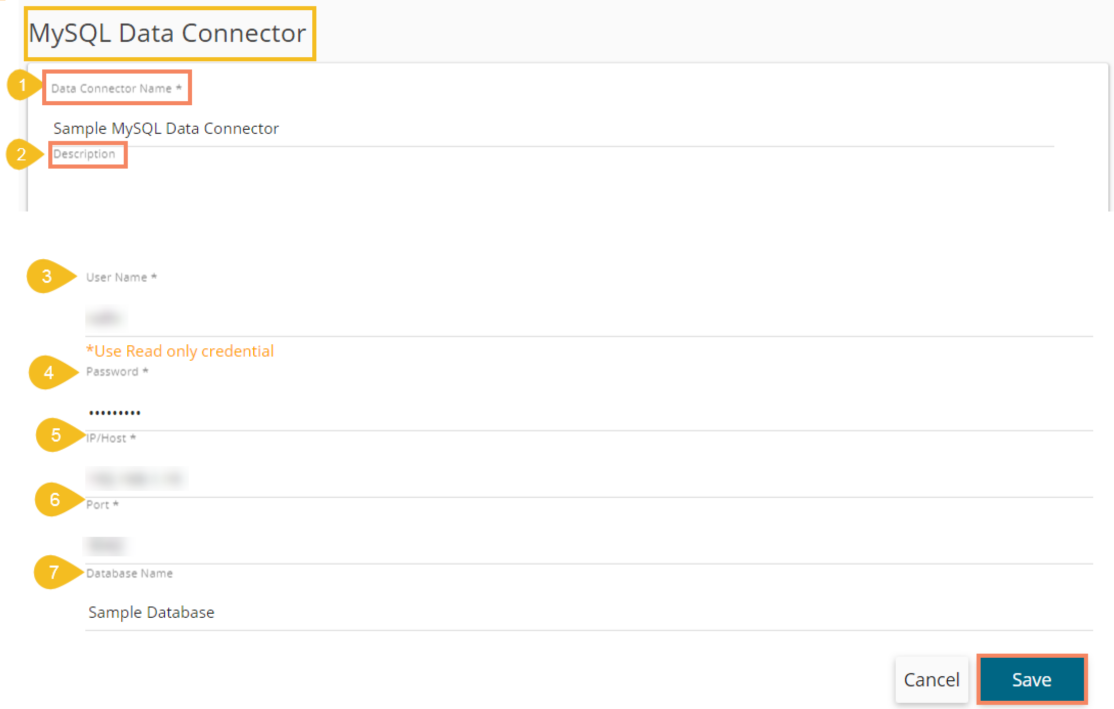
vii) The Data Connectors page gets customized based on the selected category (E.g., the following image displays all the available data connectors from the Database category).



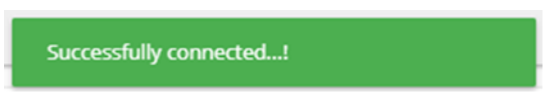
viii) By selecting a connector type, the user needs to configure that connector.

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.

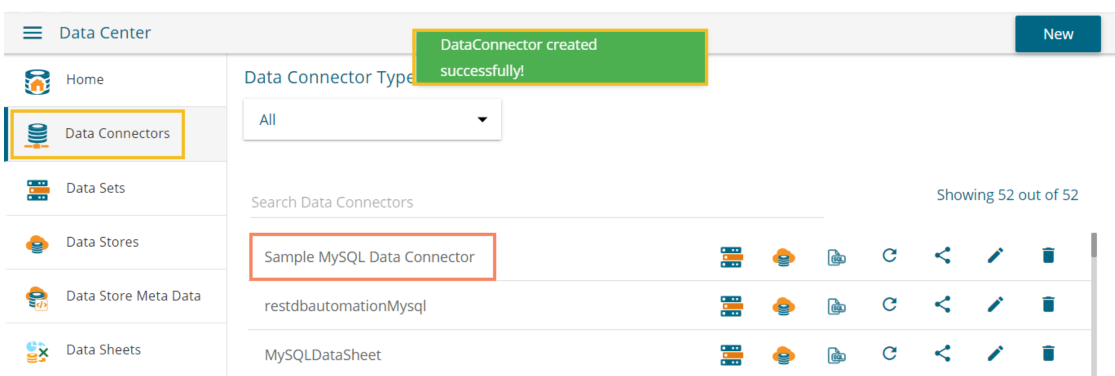


xi) A success message appears to confirm the connection (only for the database connectors).



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.



6.1.2. Supported Data Connectors

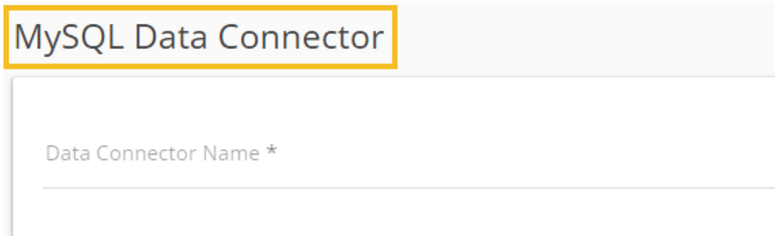
Follow the description below for information on how to configure and connect to your specific type of data. All the available data connector types are described in this section.

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).

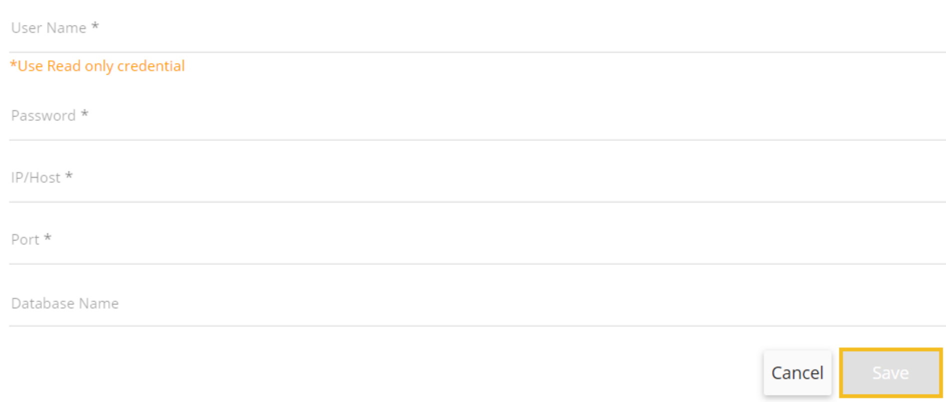
iii) **Password:** Enter the Password (It should be the same as provided in the connection server).

iv) **IP/Host**: Enter database server details (from where the user wants to fetch data).

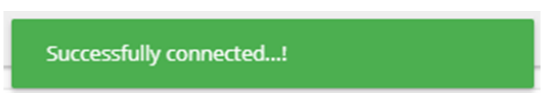
v) **Port:** Provide the server port number.

vi) **Database Name:** Name of the database where you wish to store data.

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

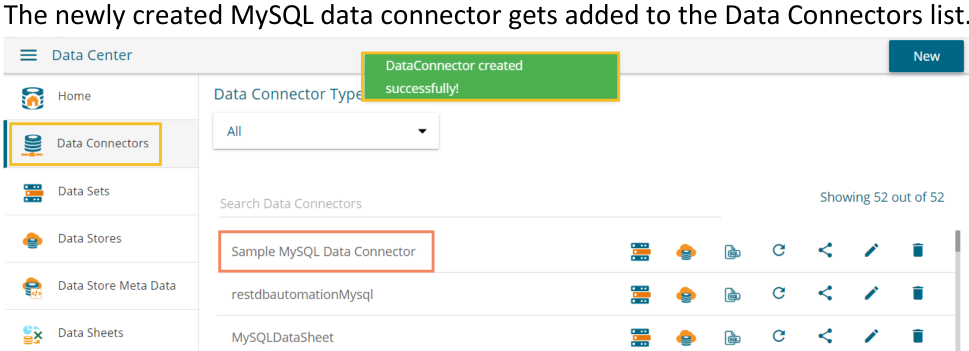


viii) A success message appears confirming the connection.



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.



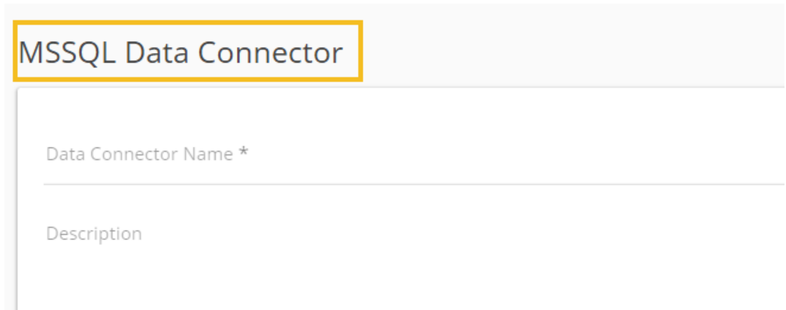
Note: The user can use the following Environment Variables instead of the actual Username and Password to create the MySQL Data Connectors.

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

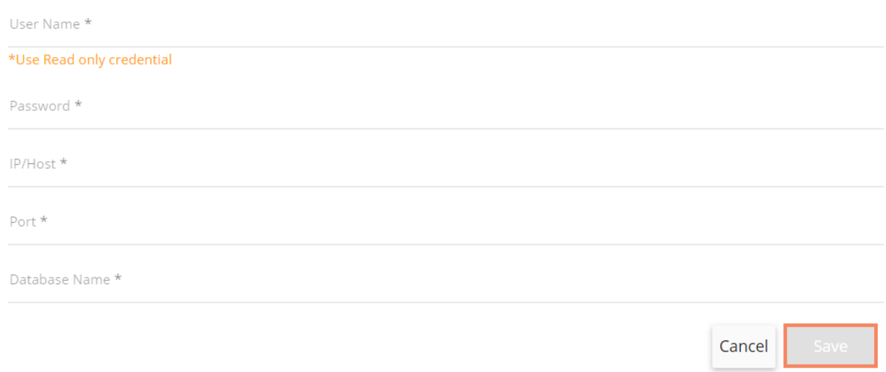
6.1.2.2. MSSQL

Provide the following information to create an MSSQL Data Connector.

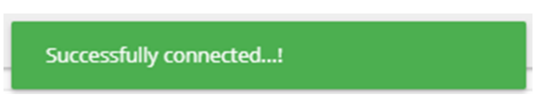
i) **Data Connector Name**: Provide a user-defined name to identify the data connector.
ii) **Description**: Provide connection details (Optional).



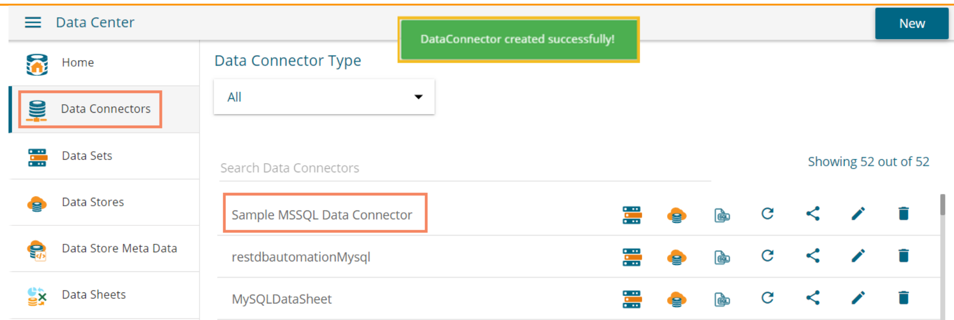
iii) **Username:** Enter a Username (It should be the same as given in the connection server).
iv) **Password**: Enter the Password (It should be the same as provided in the connection server).
v) **IP/Host:** Enter database server details (from where the user wants to fetch data).
vi) **Port:** Provide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



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.



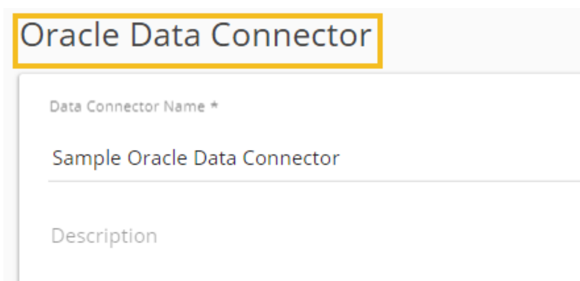
Note: The user can use the following Environment Variables instead of the actual Username and Password to create the MSSQL Data Connectors.

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

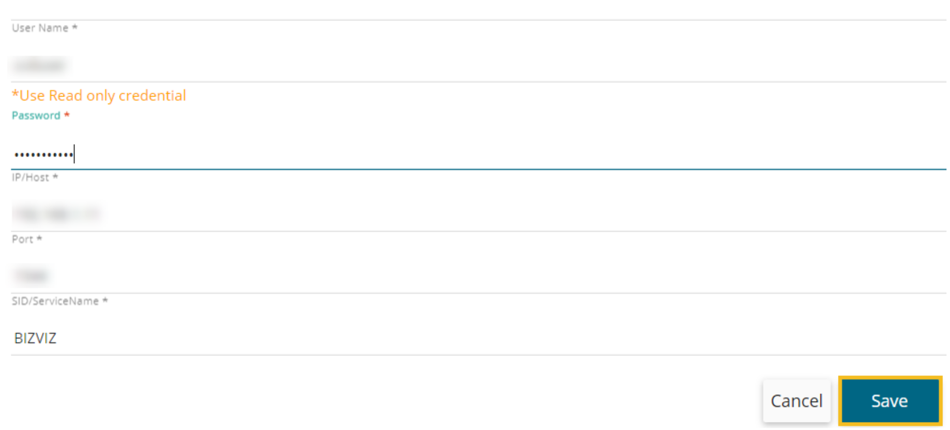
6.1.2.3. Oracle

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).

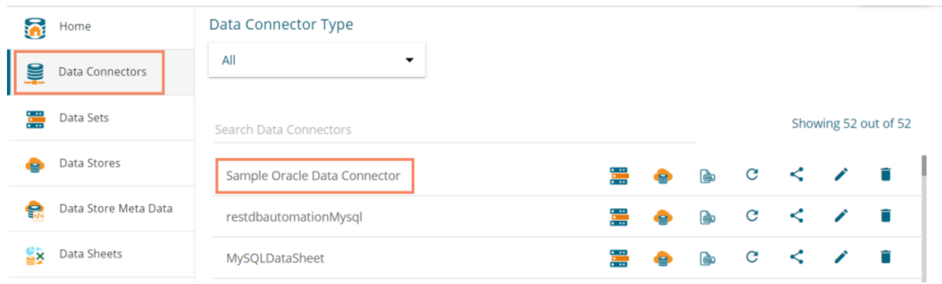


iii) **Username:** Enter a Username (It should be the same as given in the connection server).
iv) **Password:** Enter the Password (It should be the same as provided in the connection server).
v) **IP/Host**: Enter database server details (from where the user wants to fetch data).
vi) **Port**: Provide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



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.



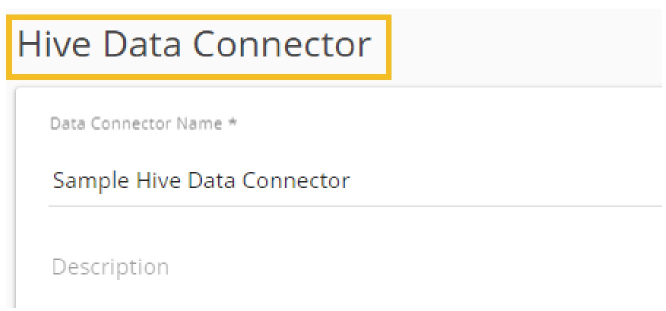
Note: Note: The user can use the following Environment Variables instead of the actual Username and Password to create the Oracle Data Connectors.
Username: ENV.ORACLEUSERNAME
Password: ENV.ORACLEPASSWORD

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).



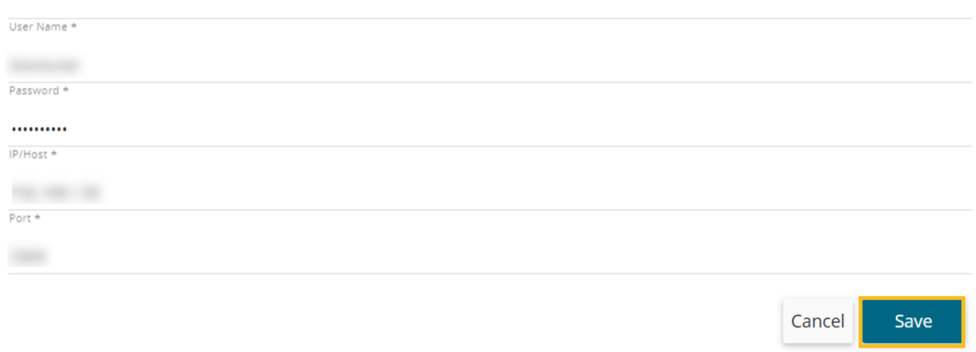
iii) **Username:** Enter a Username (It should be the same as given in the connection server).

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**.**

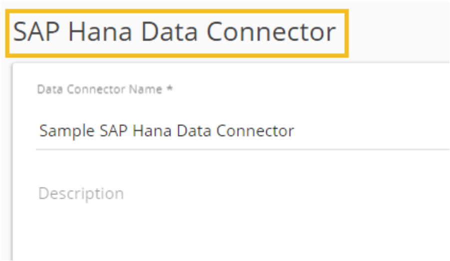


viii) The success messages appear to confirm the connection and data connector creation, and the newly created Hive data connector gets added to the Data Connectors list.

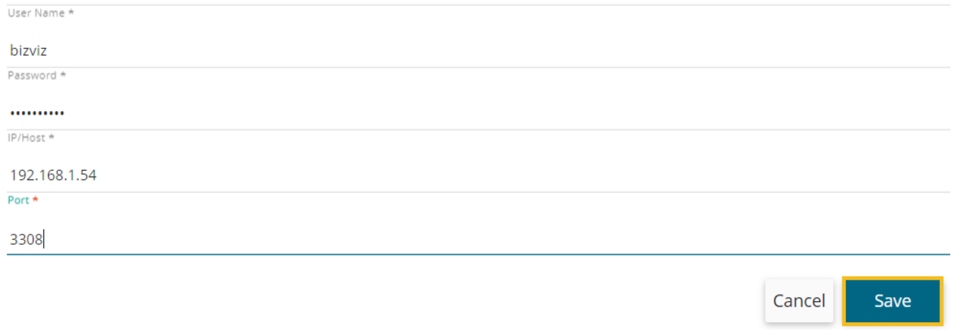
6.1.2.5. SAP Hana

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).



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.

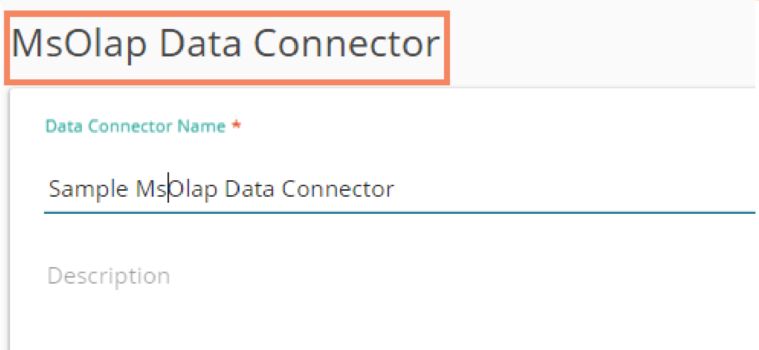


viii) The newly created SAP Hana data connector gets added to the Data Connectors list.

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).



iii) **Username:** Enter a Username (It should be the same as given in the connection server).

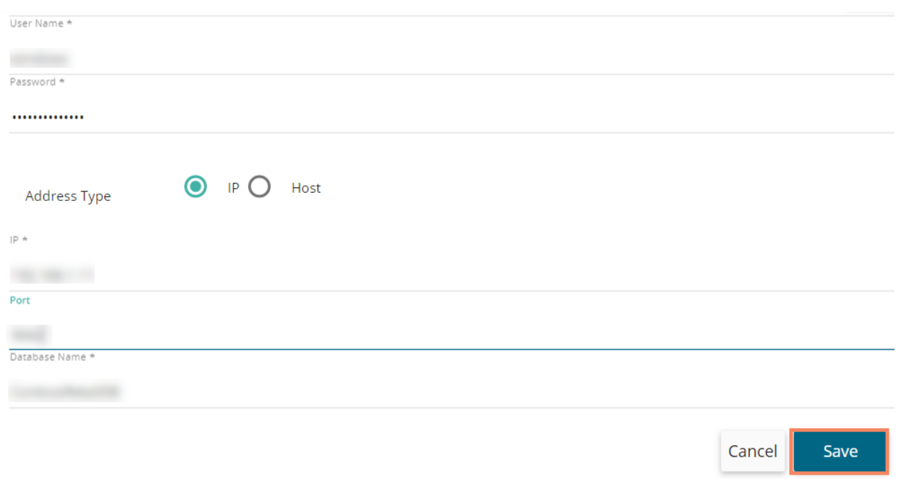
iv) **Password:** Enter the Password (It should be the same as provided in the connection server).

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**.**



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.

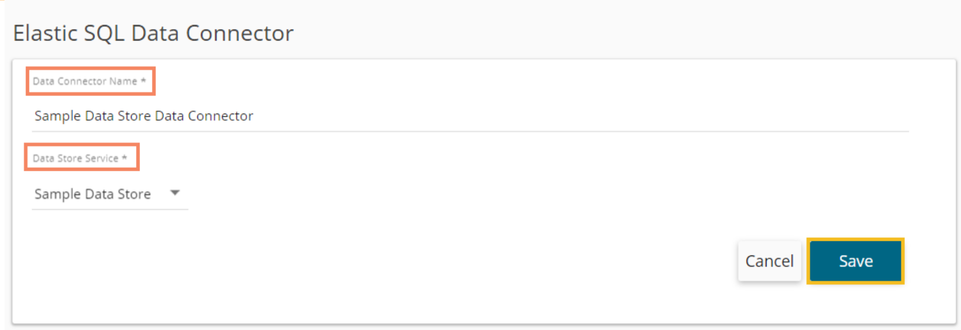
6.1.2.7. Data Store

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.

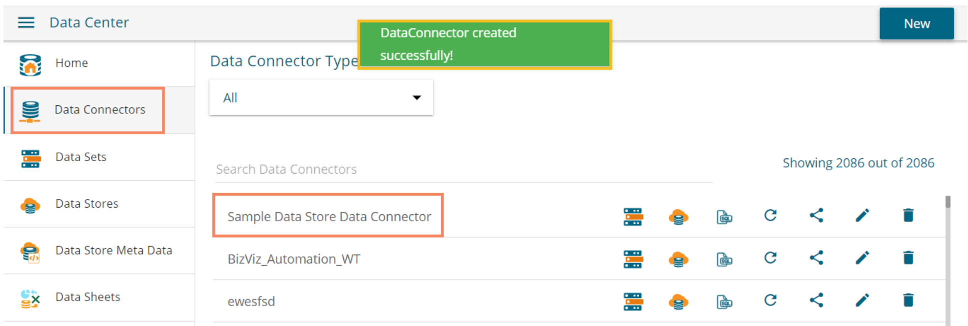
ii) **Data Store Service:** Select a data store service from the drop-down list.

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



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.

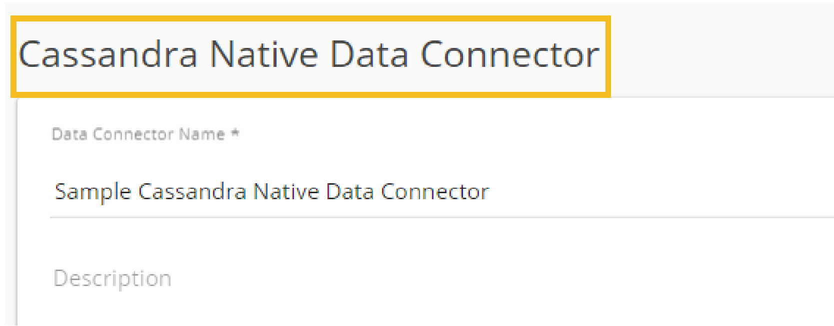


6.1.2.8. Cassandra Native Data Connector

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).



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).

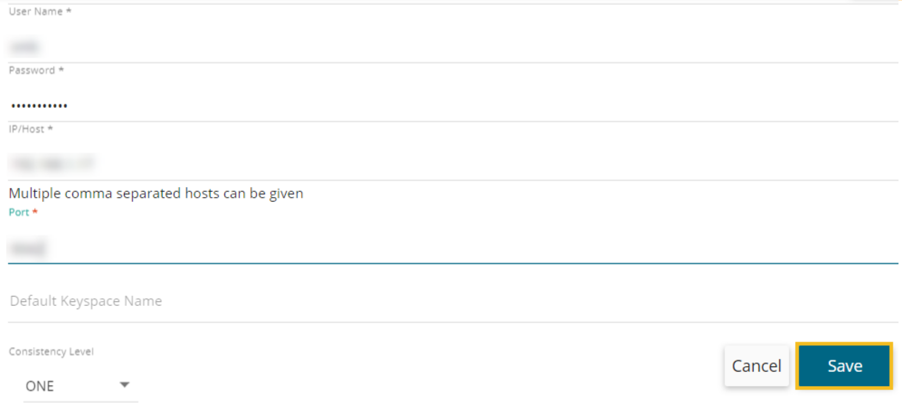
v) **IP/Host:** Enter database server details (from where the user wants to fetch data).

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.



x) The success messages appear to confirm the connection and creation of the new data connector.

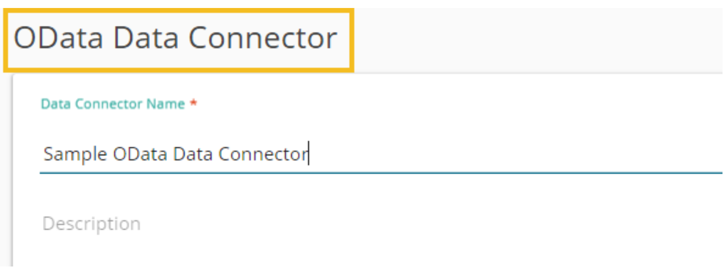
xi) The newly created Cassandra Native Data Connector gets added to the Data Connectors list.

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.



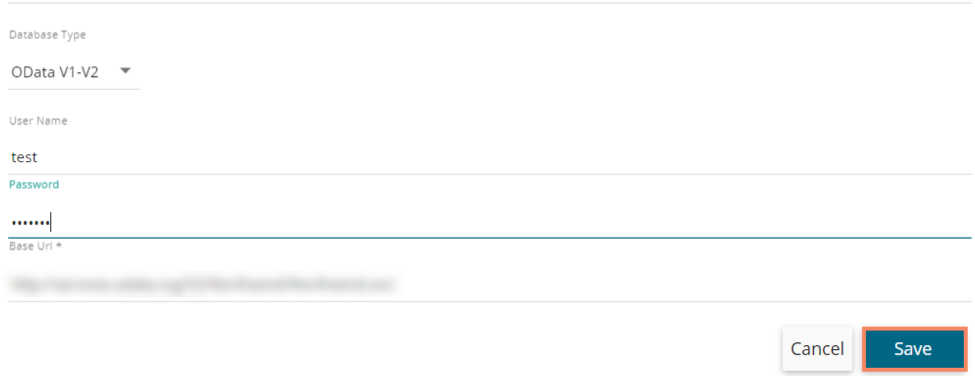
iii) **Database Type:** Select the Database type using the drop-down menu in which you wish to store the data(OData V1-V2/OData V3-V4).

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.

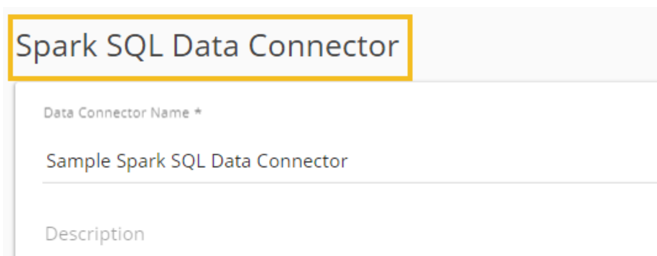


viii) The success messages appear to assure the new OData connection.
ix) The newly created OData Data Connector gets added to the Data Connectors list.

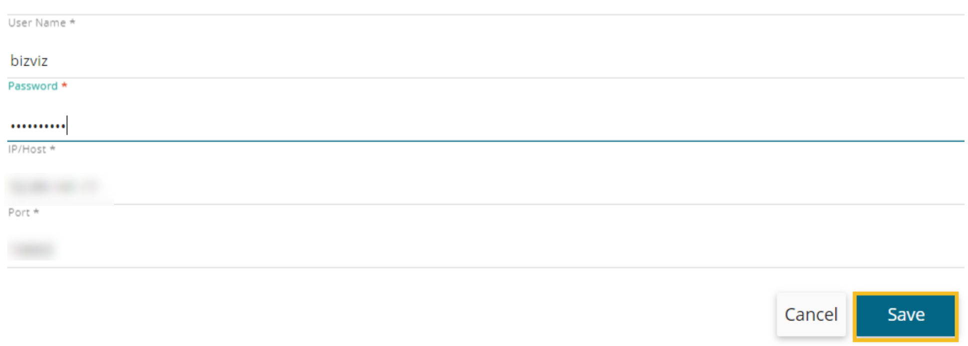
6.1.2.10. Spark SQL Data Connector

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).



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.

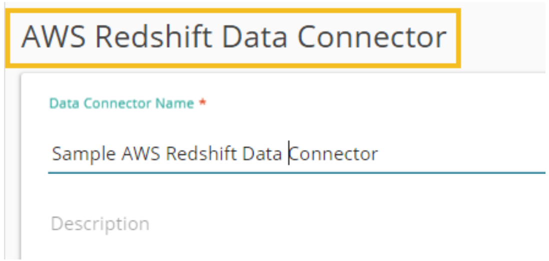


viii) The newly created Spark SQL Data Connector gets added to the Data Connectors list.

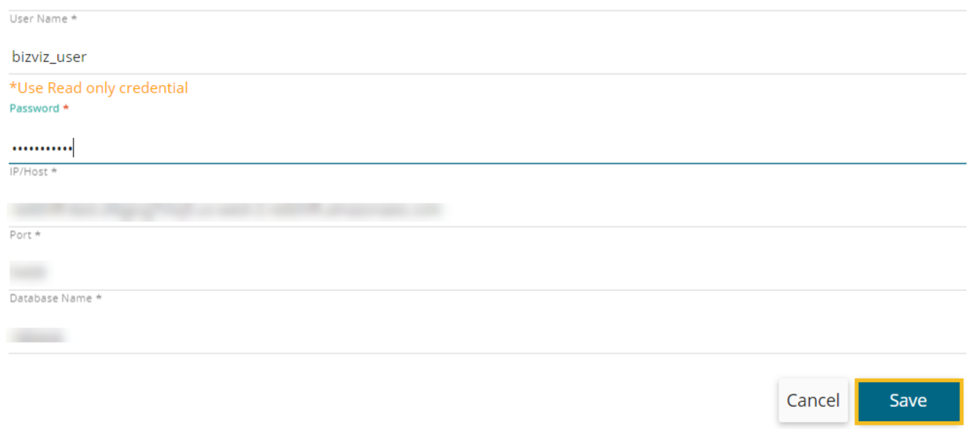
6.1.2.11. AWS Redshift

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.



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.

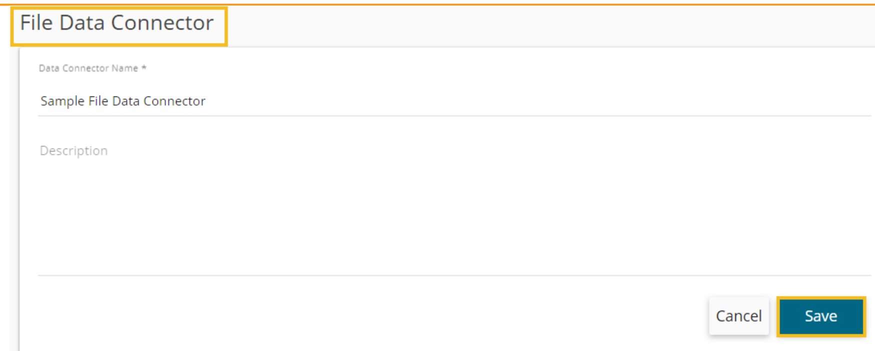


ix) The success messages appear to assure the data connection, and the newly created AWS Redshift data connector gets added to the Data Connectors list.

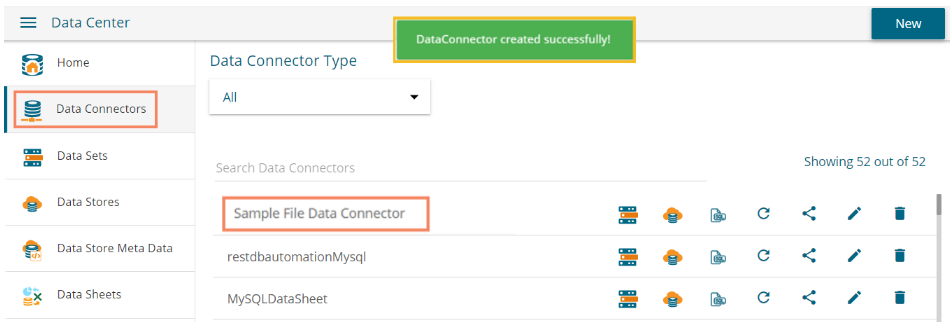
6.1.2.12. File

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.



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



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

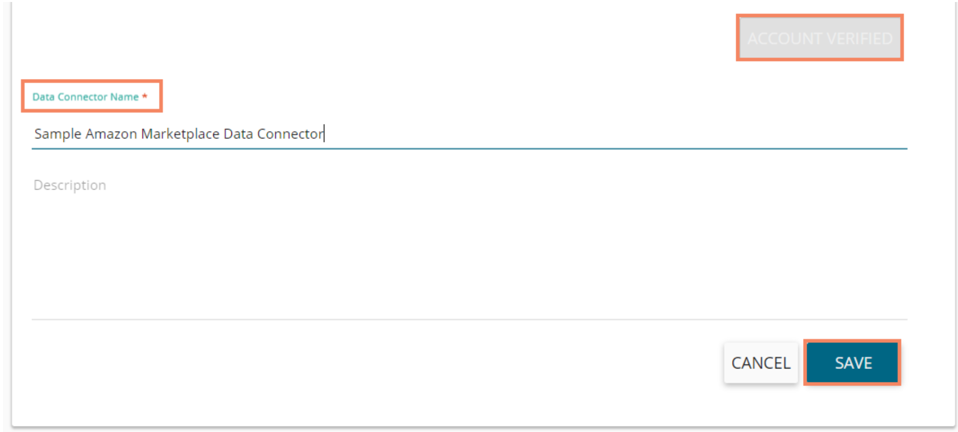
Provide the following information to create an Amazon Data Connector.

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.

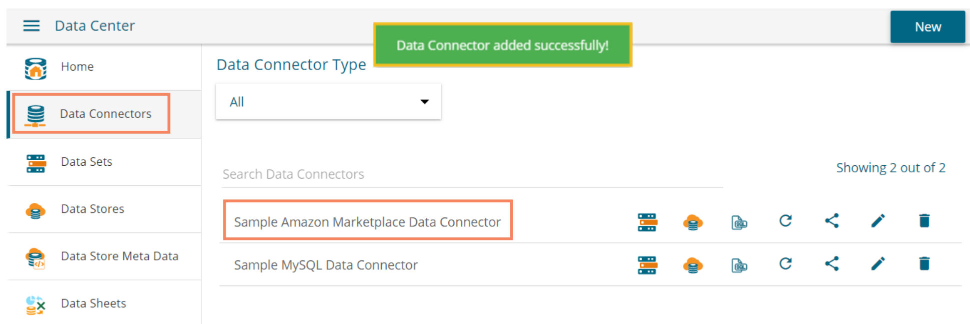
v) A success message appears to confirm that the account has been successfully verified.

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

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



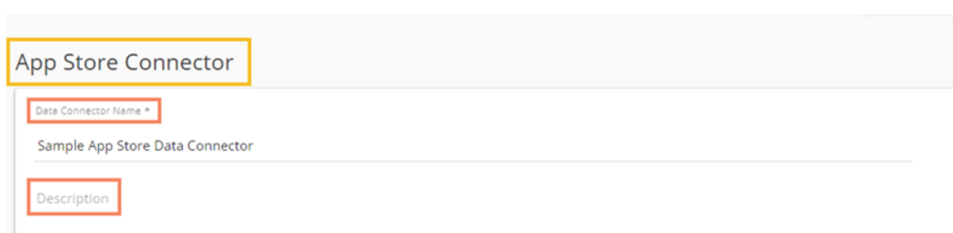
ix) A success message appears, and the newly created Amazon Marketplace Connector gets added to the data connector list.



6.1.2.14. App Store

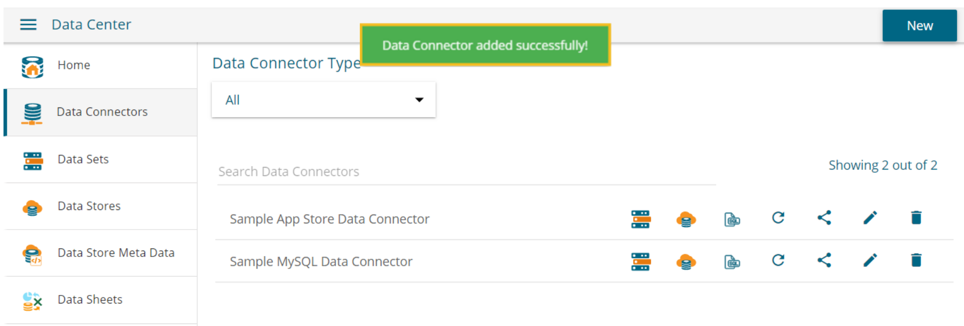
Provide the following information to create an App Store Data Connector using the App Store Connector page.

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



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.

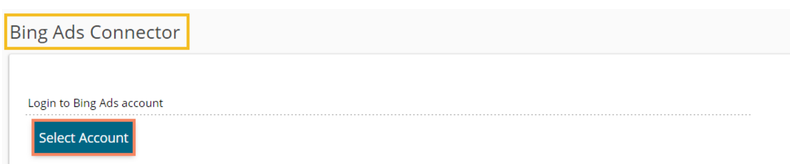
v) A success message appears, and the newly created App Store data connector gets added to the Data Connectors list.



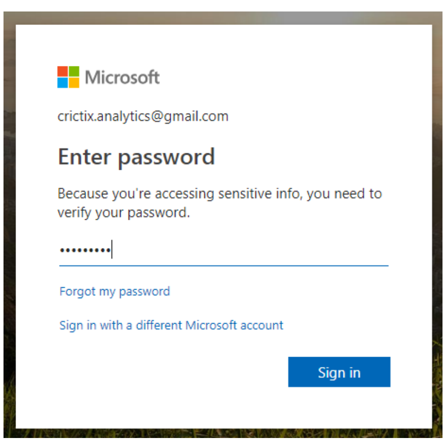
6.1.2.15. Bing Ads

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

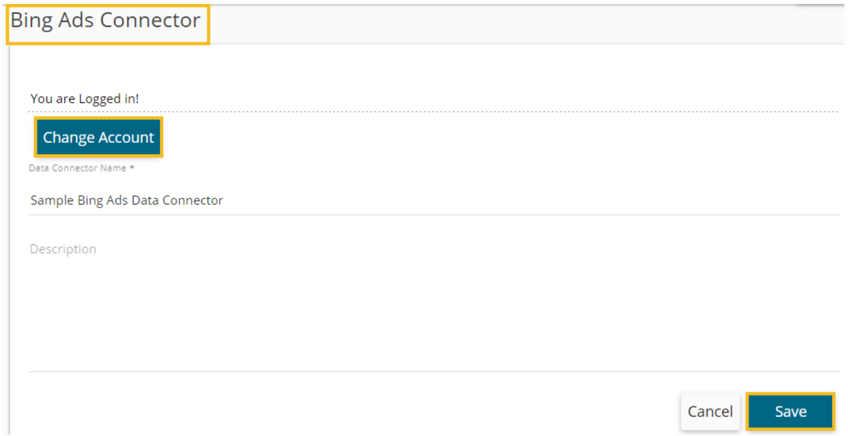
i) Log in to a Bing Ads account by clicking on the '**SELECT ACCOUNT**' option.



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



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.

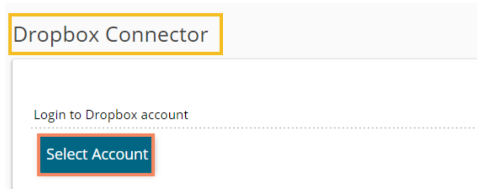


vi) A success message appears the newly created Bing Ads Data Connector gets added to the Data Connectors list.

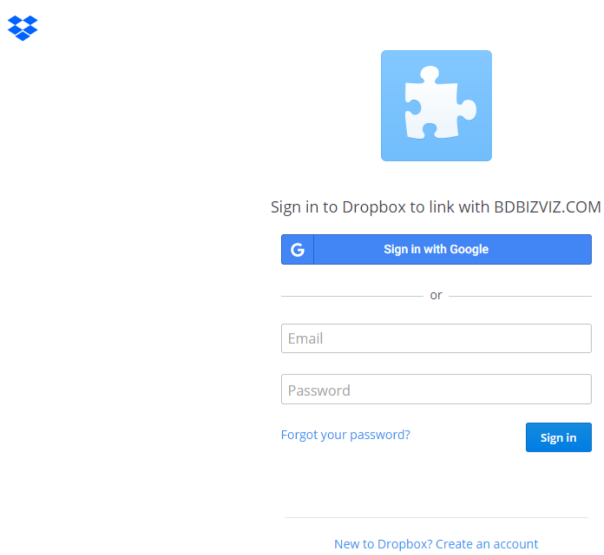
6.1.2.16. Dropbox

Provide the following information to create a Dropbox Data Connector.

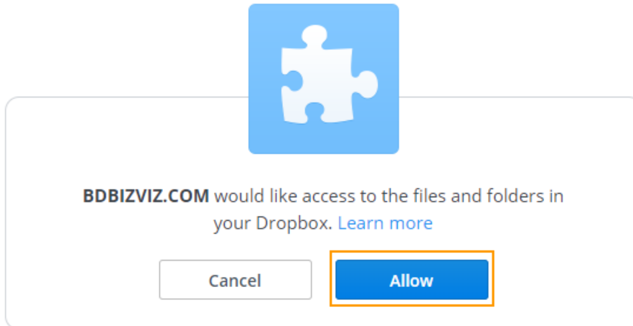
i) Click the '**Select Account**' option to log in to a Dropbox account.



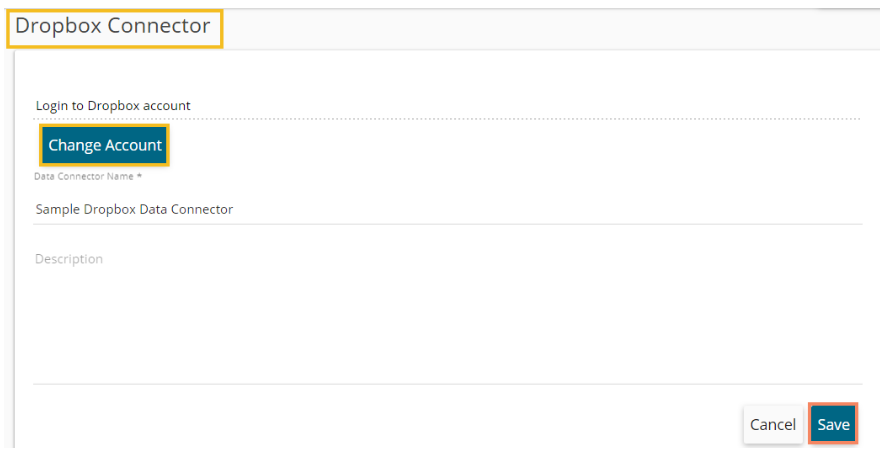
ii) The '**Sign in**' page of the Dropbox opens.
iii) Enter the credentials to Sign in.



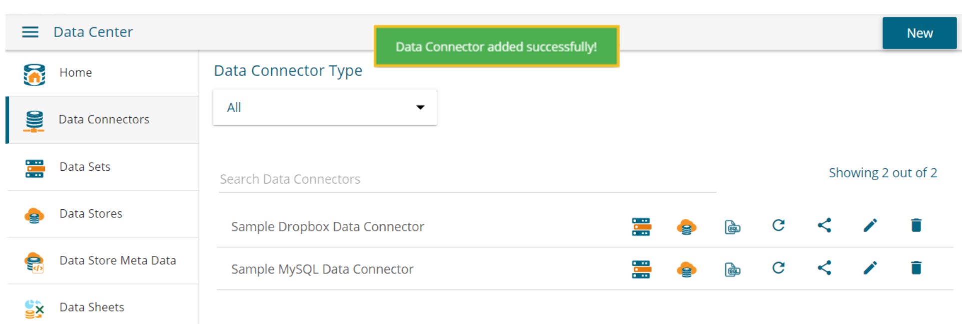
iv) A message appears asking to allow the selected Dropbox account access to BDB.
v) Click the ‘**Allow**’ option to provide access to the selected Dropbox account.



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.



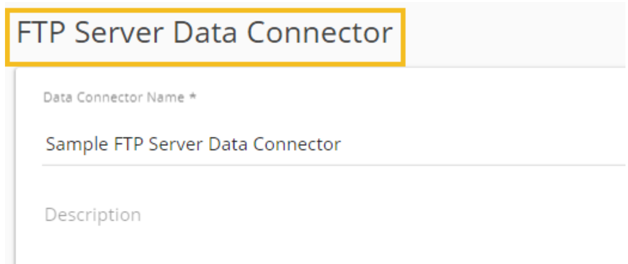
ix) A success message appears, and the newly created Dropbox Data Connector gets added to the Data Connectors list.



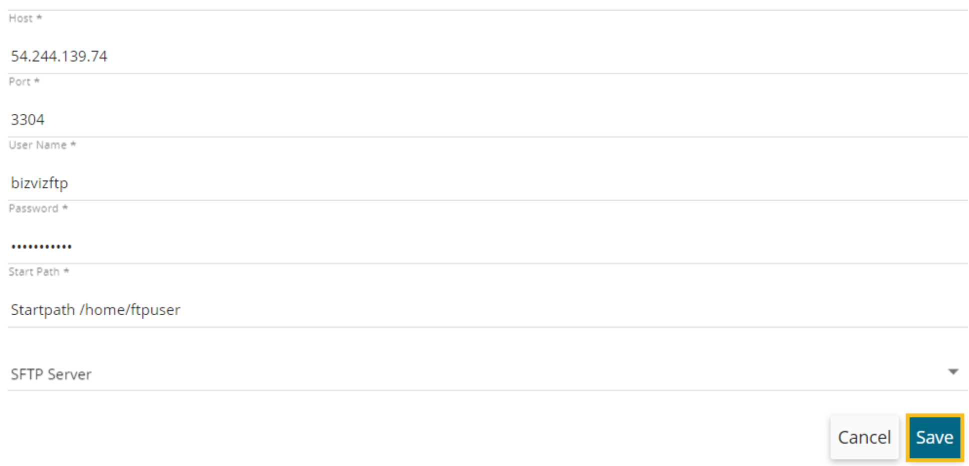
6.1.2.17. FTP Server

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).



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.

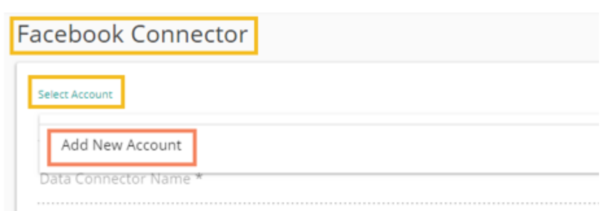


ix) A success message appears, and the newly created FTP Server data connector gets added to the Data Connectors list.

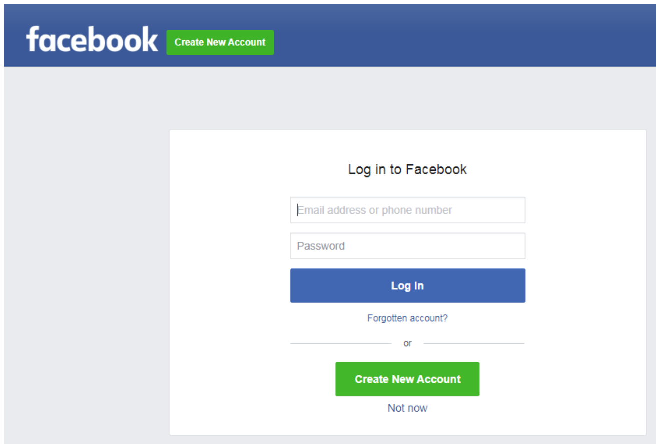
6.1.2.18. Facebook

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.

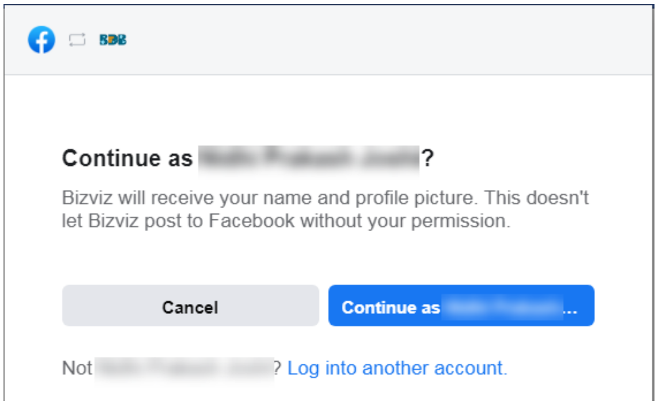


ii) Enter the credentials of a Facebook account to log in.

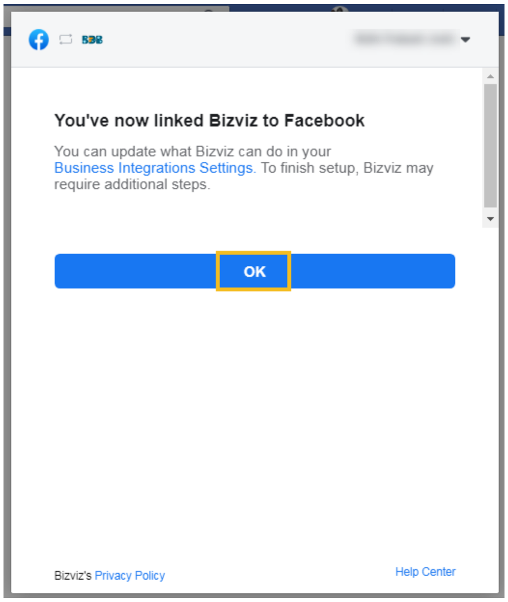


iii) A new page opens, allowing BizViz to access the information from the logged in Facebook account.

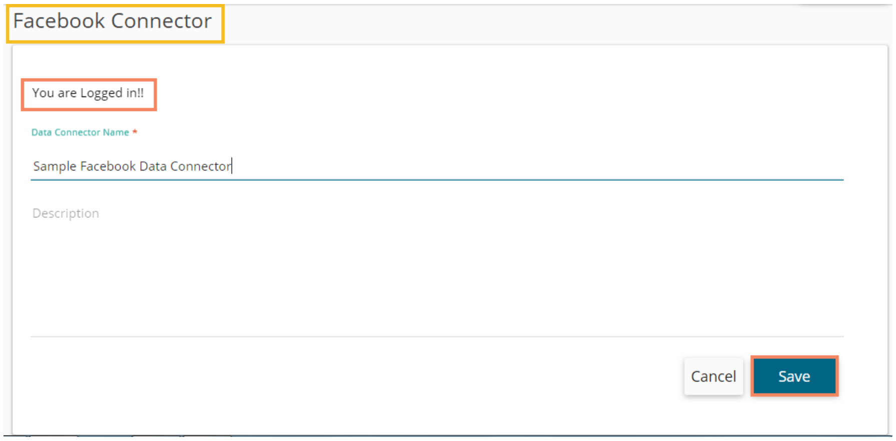
iv) Click the ‘**Continue as… The profile owner’s name**’ if you wish to map the same account, or use ‘**Edit This**’ option to edit the information.



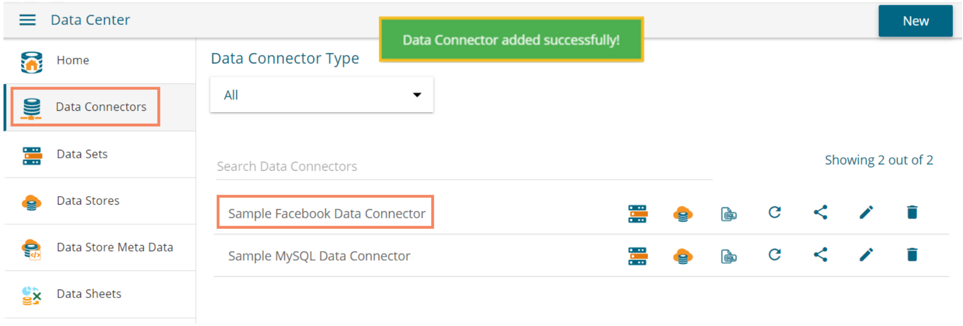
v) Select the ‘**OK**’ option to link BizViz with the selected Facebook account (it may ask for a few additional steps if there is no page created from the selected Facebook account).



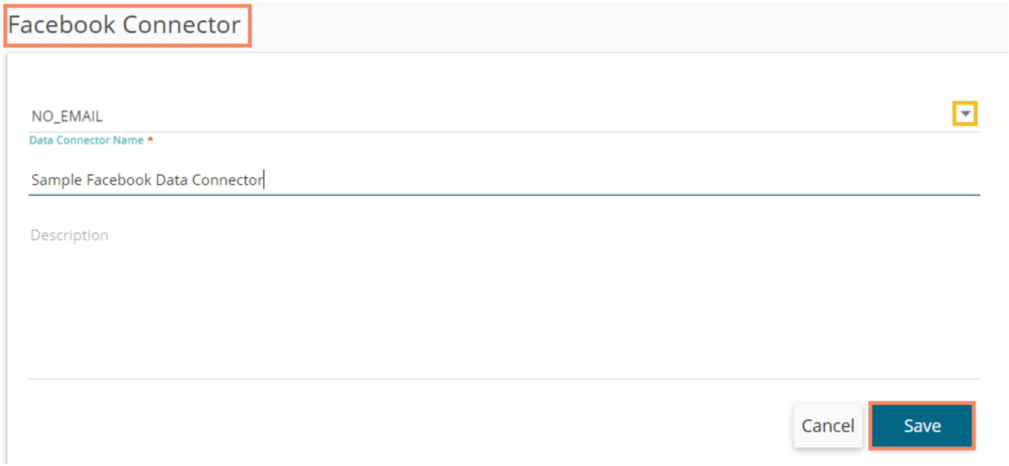
vi) By selecting the continuation option, the user gets notified as logged in to the selected Facebook account and the Facebook Connector page reopens.
vii) Provide a title for the Data Connector.
viii) Describe the Data Connection (Optional).
ix) Click the '**Save**' option.



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



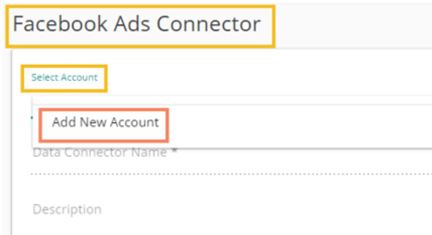
Note: The below given page opens if the user selects an account using the '**Select Account**' drop-down menu. In this scenario, the user needs to provide only the Data Connector name, Description (optional), and click the '**Save**' option to create a new Facebook Data Connector.



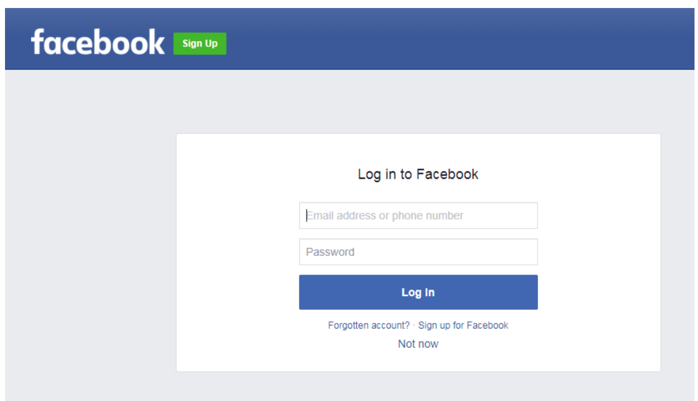
6.1.2.19. Facebook Ads

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

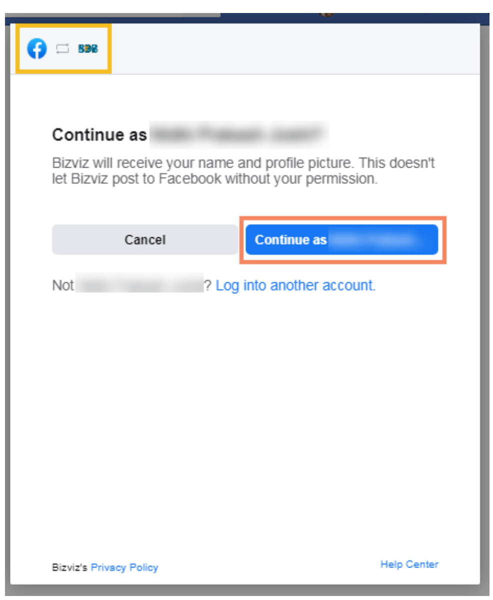
i) Select the '**Add New Account**' option from the **Select Account** drop-down list add a new Facebook account.



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.

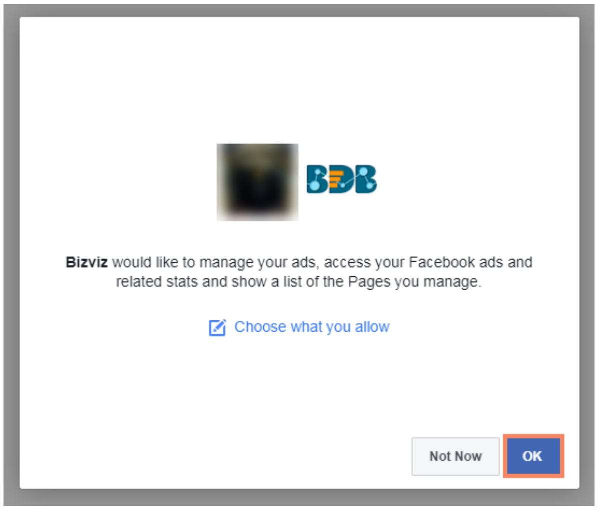


iii) A new page appears to confirm whether the user wants to continue as the displayed name or want to edit it.



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.

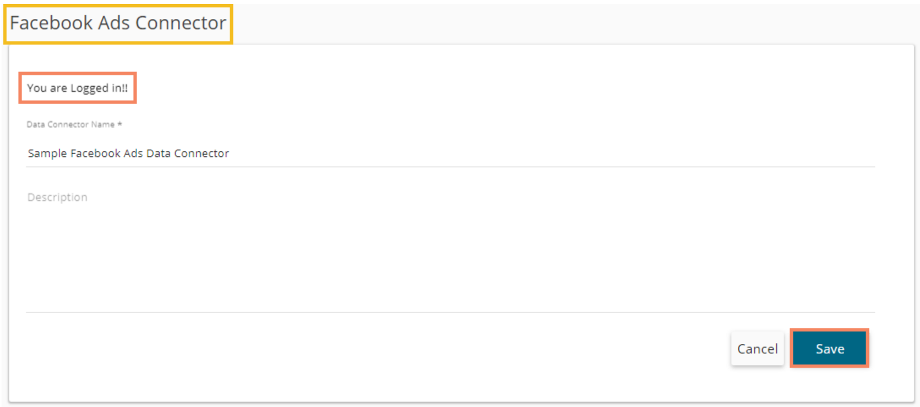


vi) The Facebook Ads Connector page reopens with the notification that the user has logged in to the selected Facebook account.

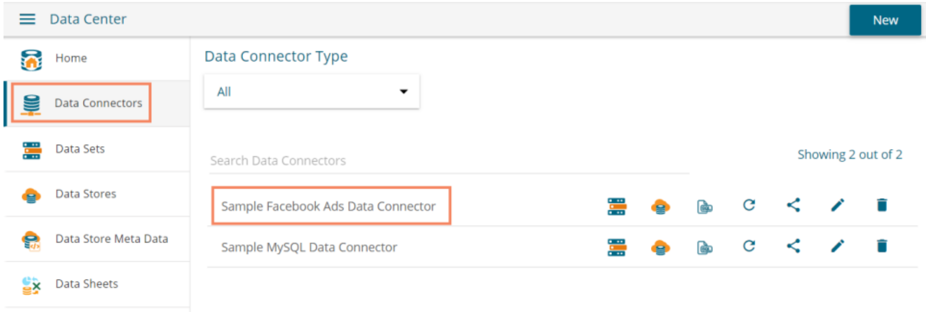
vii) Provide a Data Connector name.

viii) Describe the data connection (optional).

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



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



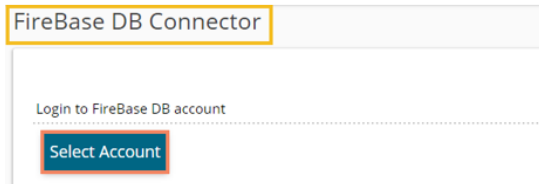
6.1.2.20. Firebase DB

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

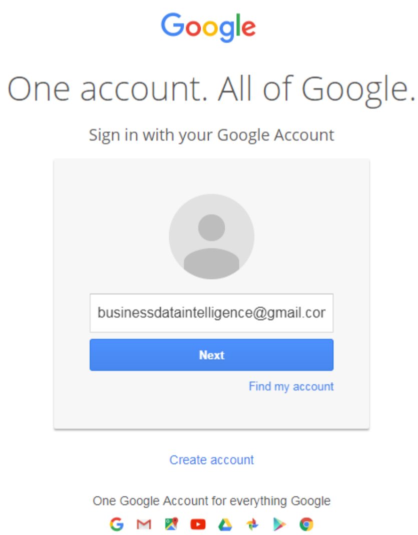
i) Click the '**Firebase**' Data Connector icon from the Data Connector page.

ii) The Firebase Data Connector page opens.

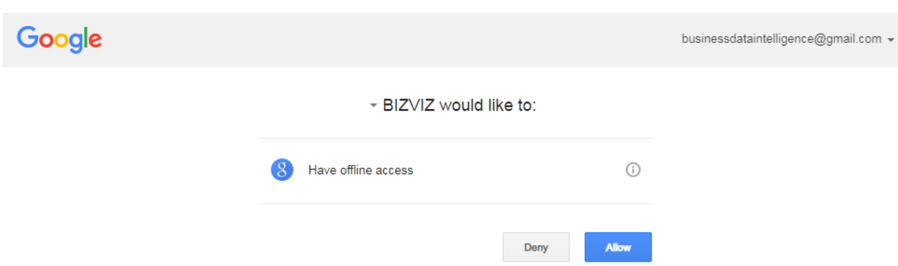
iii) Click the '**Select Account**' option.



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.

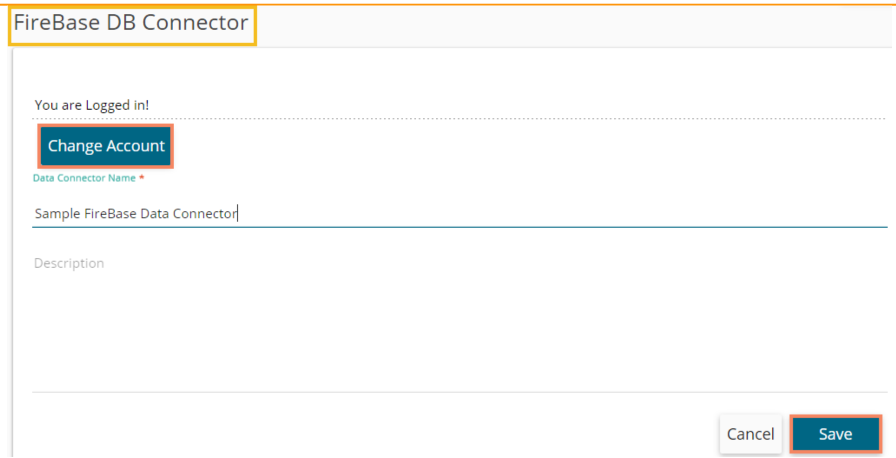


vi) The Firebase Data Connector page opens with a notification that the users is successfully logged in to the selected account

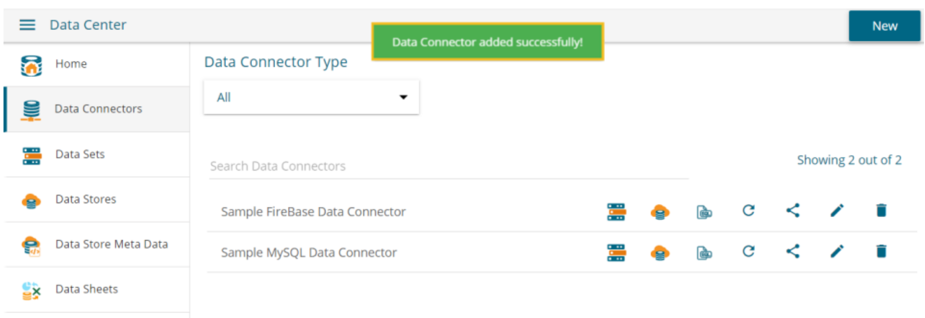
a. Provide the Data Connector name.

b. Describe the Data connection (optional).

c. Click the '**Save**' option.



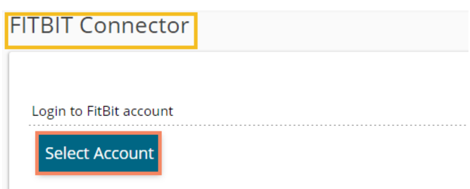
vii) A success message appears, and the newly created Firebase data connector gets added to the Data Connectors list.



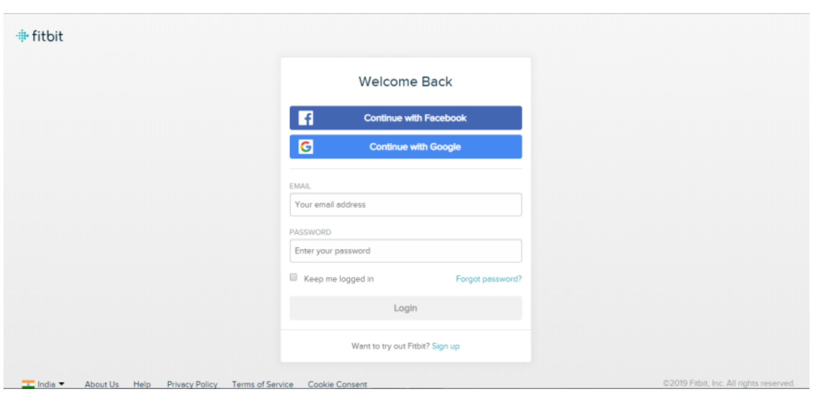
6.1.2.21. Fitbit

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

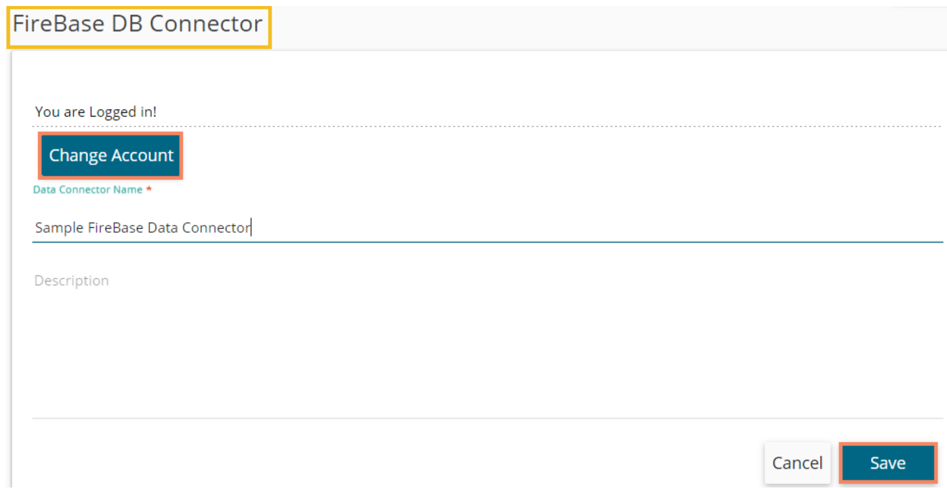
i) Click the '**Fitbit'** Data Connector icon from the Data Connector page.
ii) The FITBIT Data Connector page opens.
iii) Log in to a Fitbit account by clicking on the '**Select Account**' option.



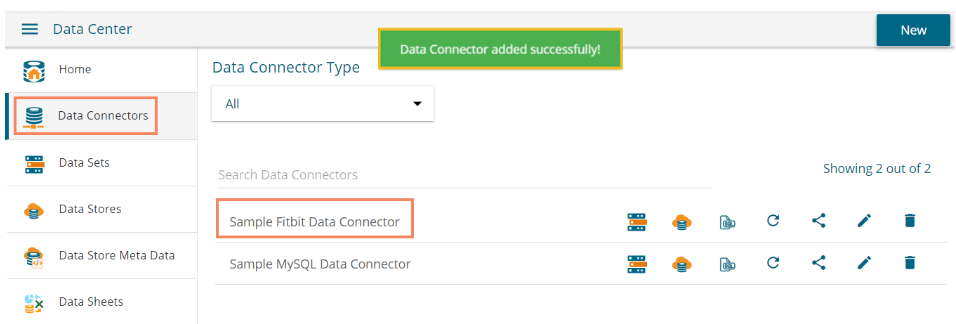
iv) A new page opens, asking the credentials for your Fitbit account.



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.

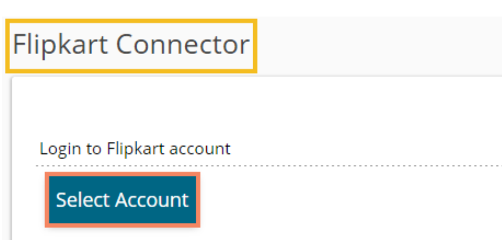


xi) A success message appears, and the newly created Fitbit Data Connector gets added to the Data Connectors list.



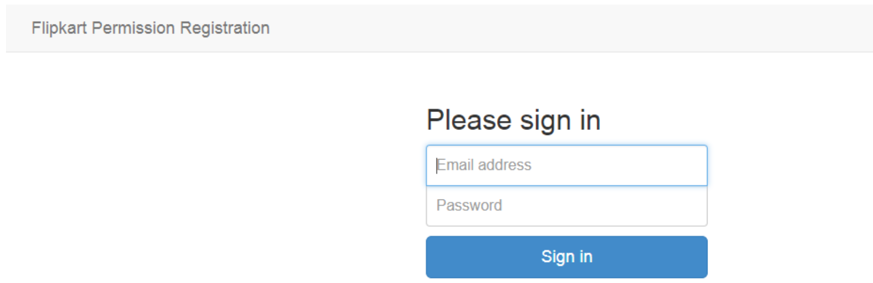
6.1.2.22. Flipkart

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



ii) Enter the credentials to get Flipkart Permission Registration for the selected Flipkart account.

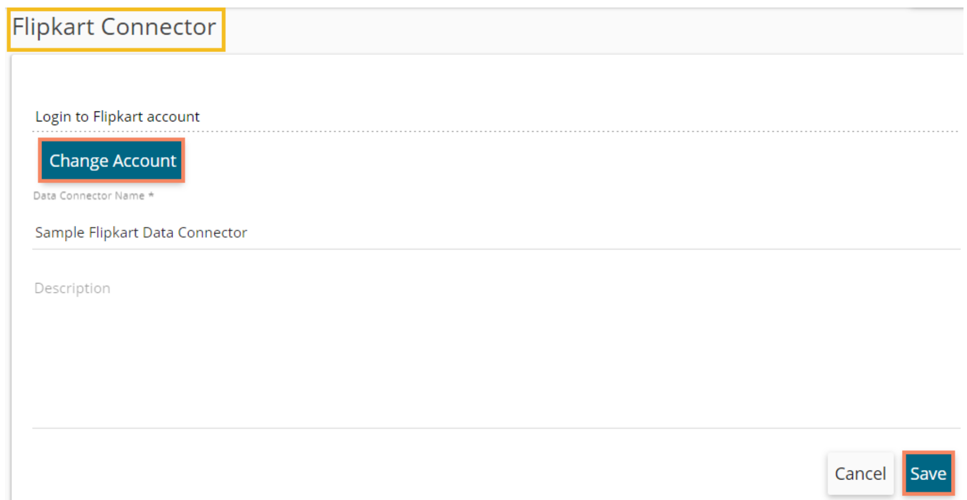
iii) Click the '**Sign In**' option.



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.

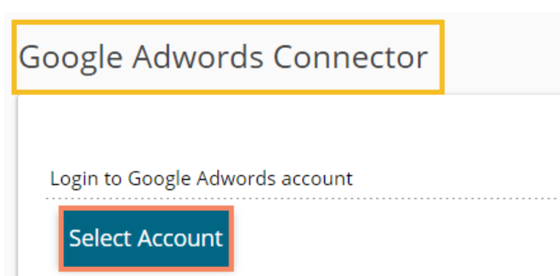


vii) A success message appears, and the newly created Flipkart Connector gets added to the data connector list.

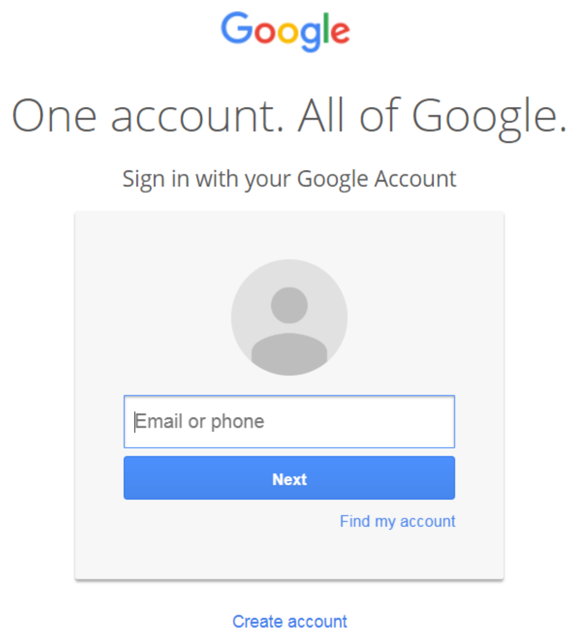
6.1.2.23. Google AdWords

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

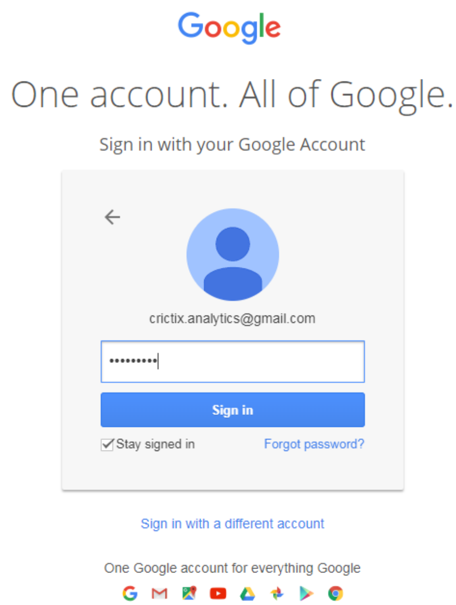
i) Click the '**Select Account**' option from the Google AdWords Connector page.



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

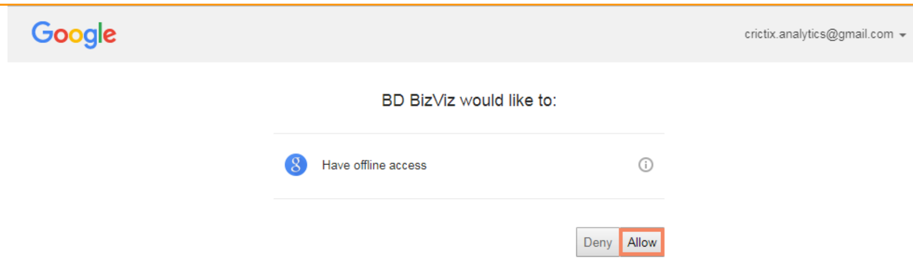


iii) Provide the correct password for the selected Google account.



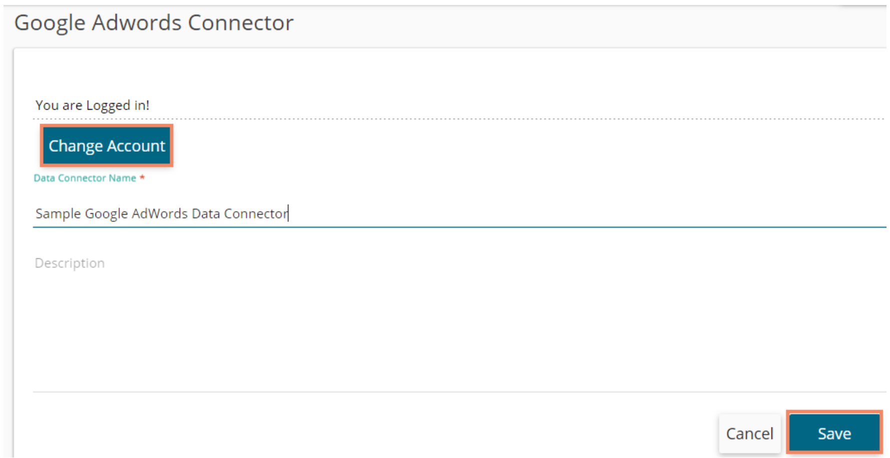
iv) The user gets a page asking permission to allow BDB data access from their selected Google AdWords account.

v) Click the '**Allow**' option to permit data access.



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.

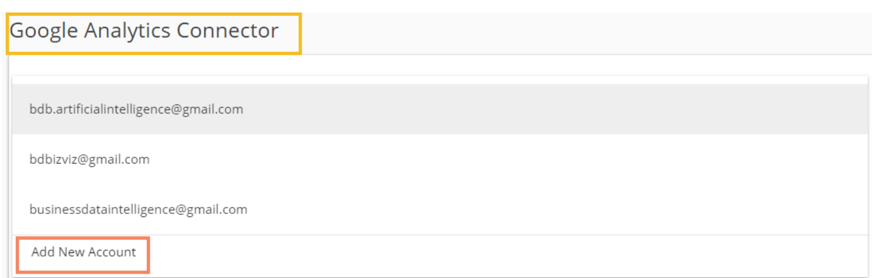


vii) A success message appears, and the newly created Data Connector gets added to the '**Data Connectors**' list.

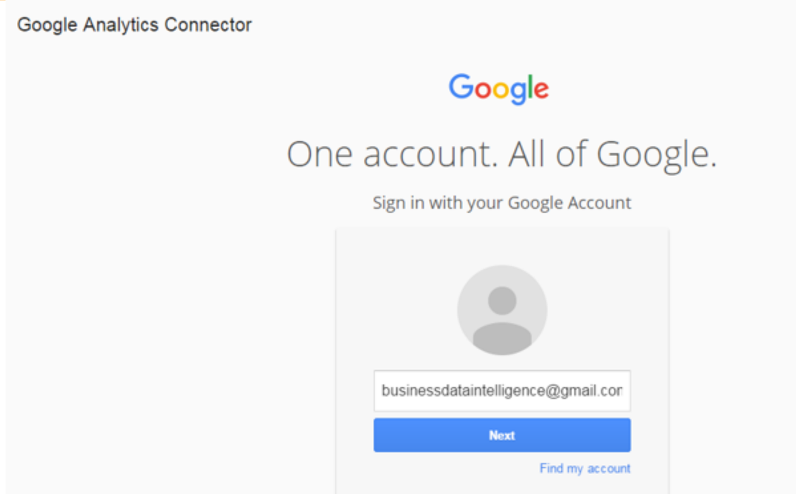
6.1.2.24. Google Analytics

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

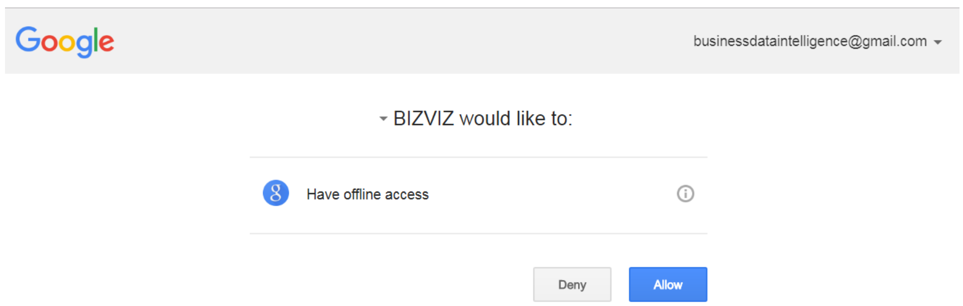
i) Select the '**Add New Account**' option to add a new Google account or select an added Google account from the Select Account drop-down menu.



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



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

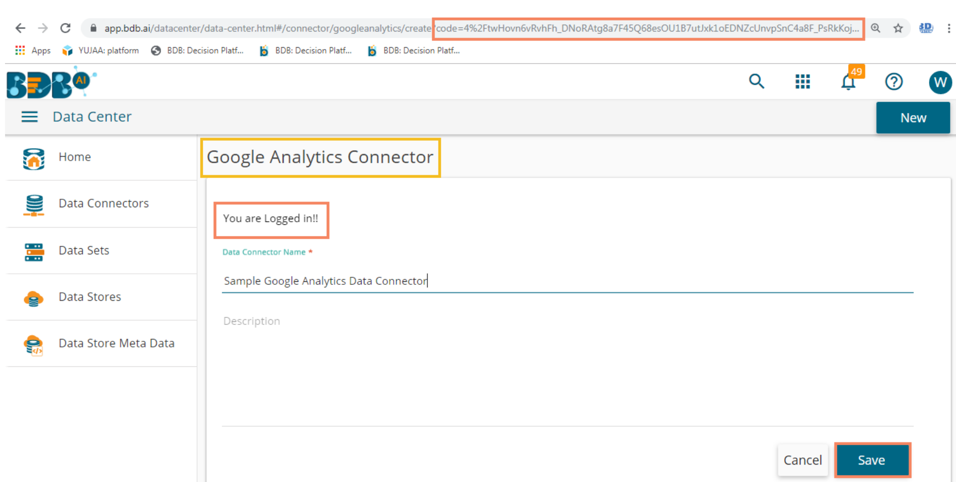


iv) The user gets redirected to the data connector form with an authorization code in the URL, after getting the access permission. The form mentions that the user has been logged in to the selected Google account.

v) **Data Connector Name:** Enter a user-defined name to identify the data connector.

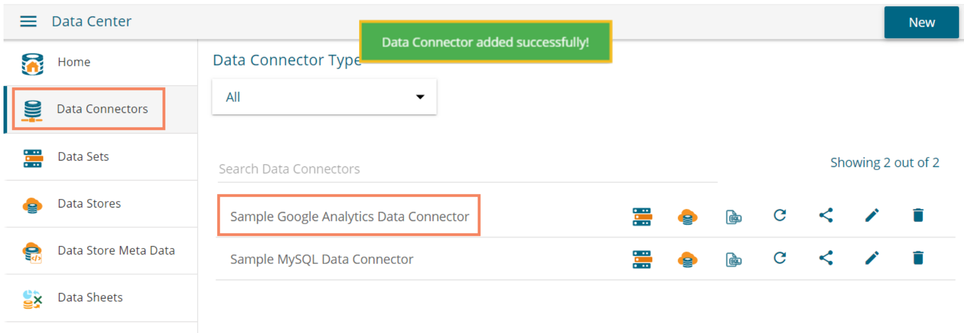
vi) **Description:** Describe the data connector (optional).

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

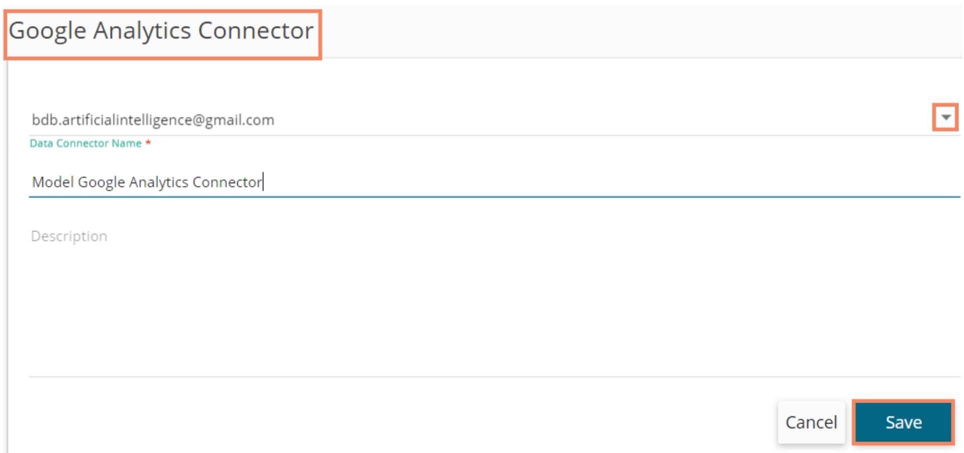


Note: The user can '**Cancel**' the connector if wished to do so from the current page.

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



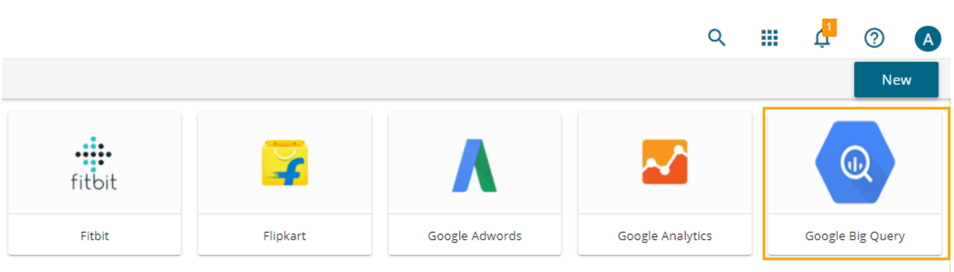
Note: The below given page opens if the user selects an account using the '**Select Account'** drop-down menu. In this scenario, the user needs to provide only the Data Connector name, Description (optional) and click the '**Save**' option to create a new Google Analytics Data Connector.



6.1.2.25. Google Big Query

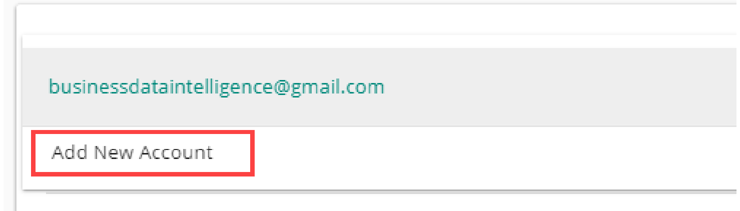
The following set of steps displays how to create a Google Form Data Connector.

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



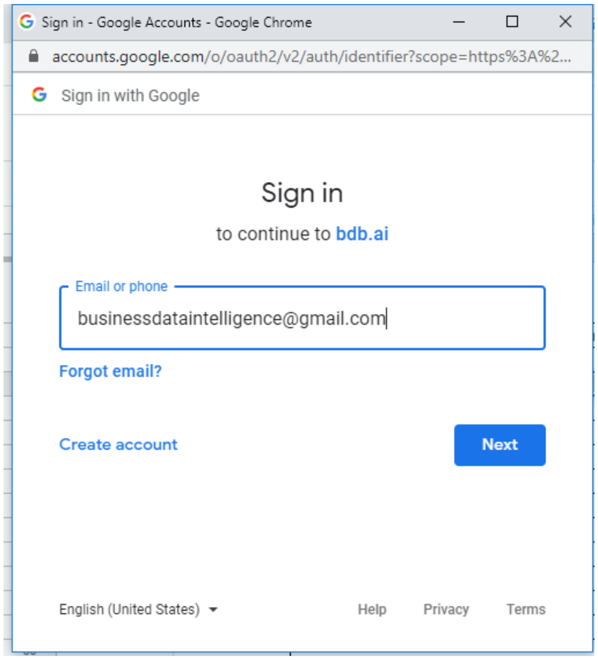
ii) The '**Google Big Query Connector**' page opens.

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.



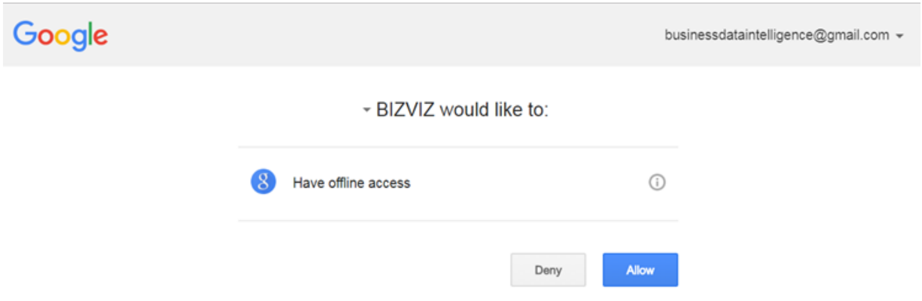
iv) The user gets redirected to select a Google account.

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.

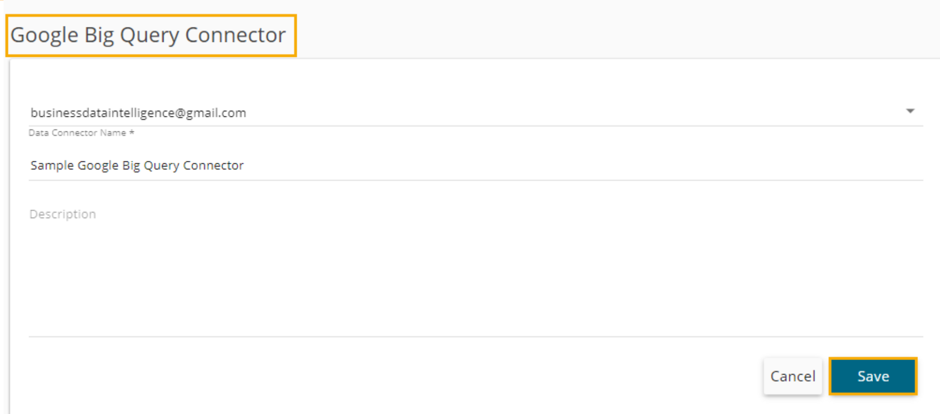
vii) Click the '**Allow**' option.



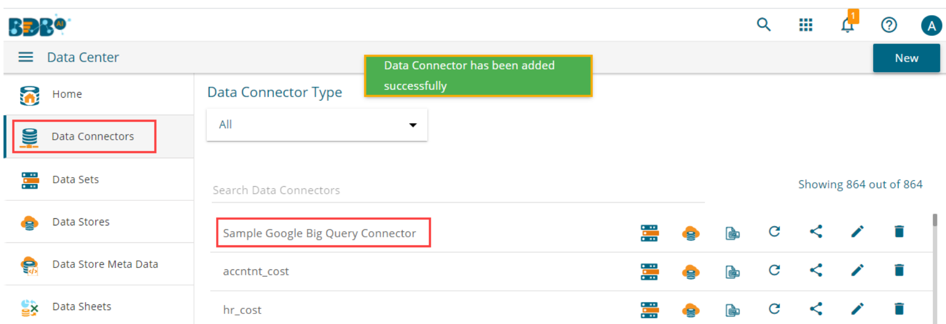
viii) The Google Forms Connector page opens again with the selected Google account.

ix) Provide a name for the Google Big Query Connector.

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



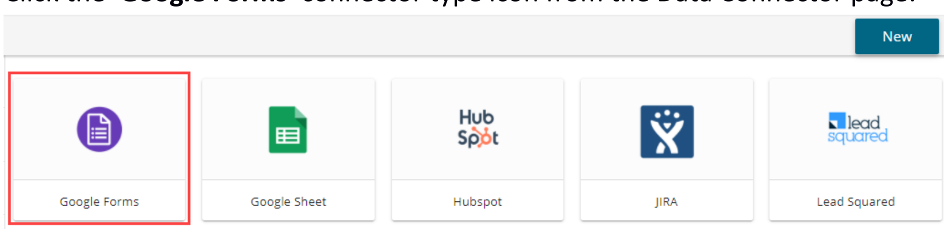
xi) A success message appears to confirm the creation of the Google Form Connector. The newly created Google Form Connector gets added to the Data Connectors list.



6.1.2.26. Google Forms

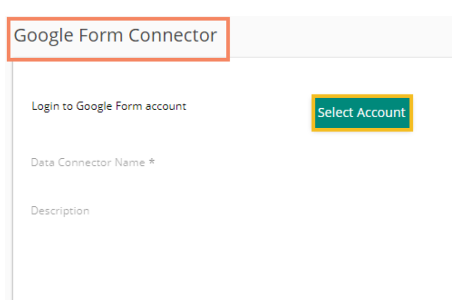
The following set of steps displays how to create a Google Form Data Connector.

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.

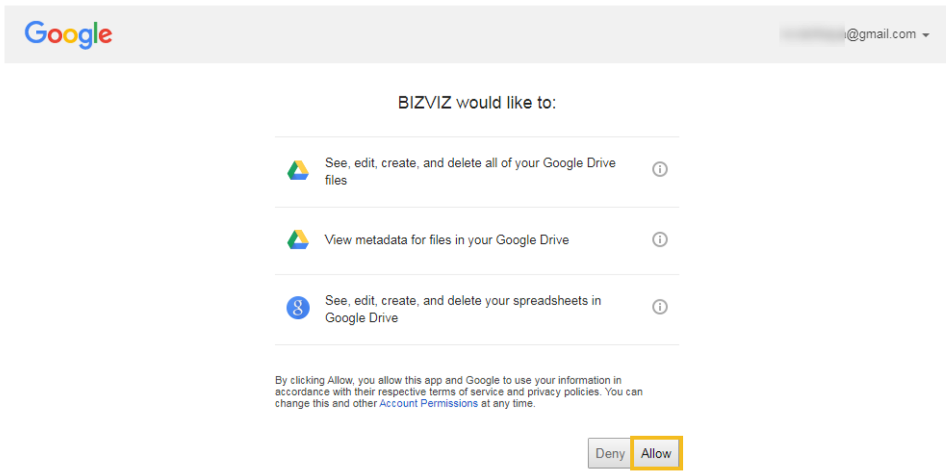


iv) The user gets redirected to select a Google account.

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.

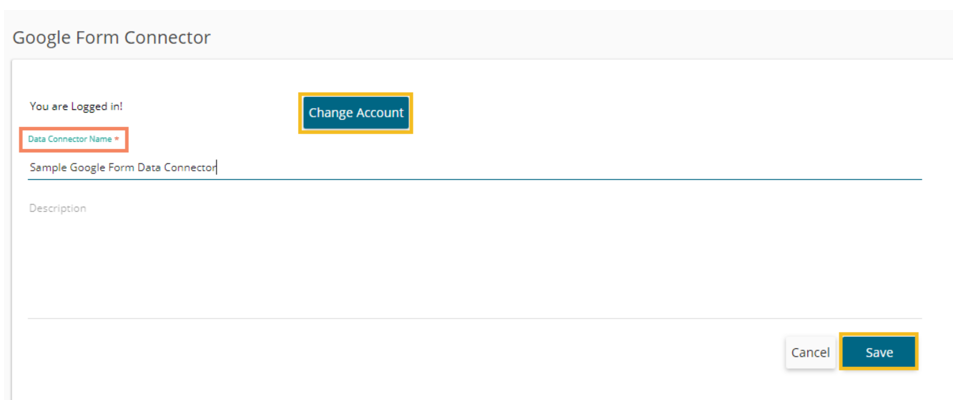
vii) Click the '**Allow**' option.



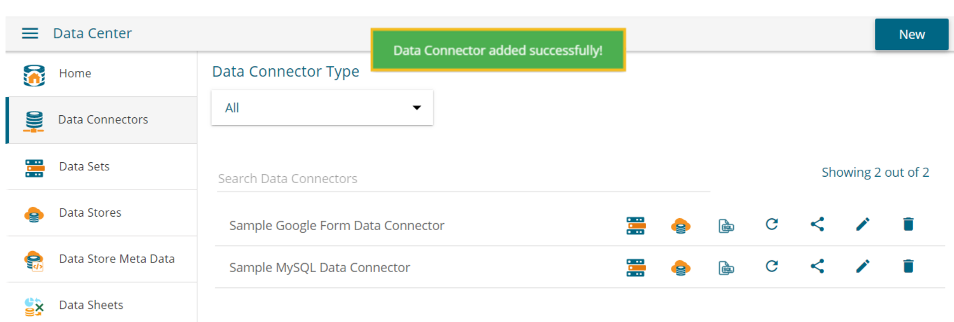
viii) The Google Forms Connector page opens again with the '**Change Account**' option.

ix) Provide a name for the Google Forms Connector.

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



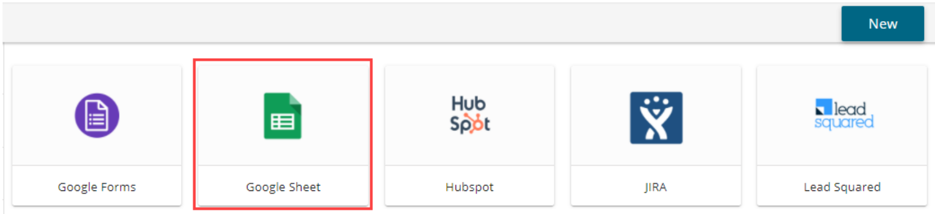
xi) A success message appears to confirm the creation of the Google Form Connector. The newly created Google Form Connector gets added to the Data Connectors list.



6.1.2.27. Google Sheet

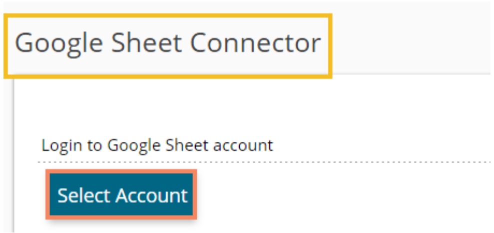
The following set of steps displays how to create a Google Sheet Data Connector.

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

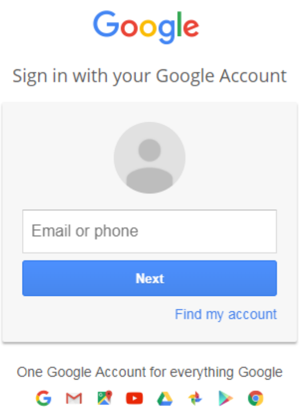


ii) The Google Sheet Connector page opens.

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

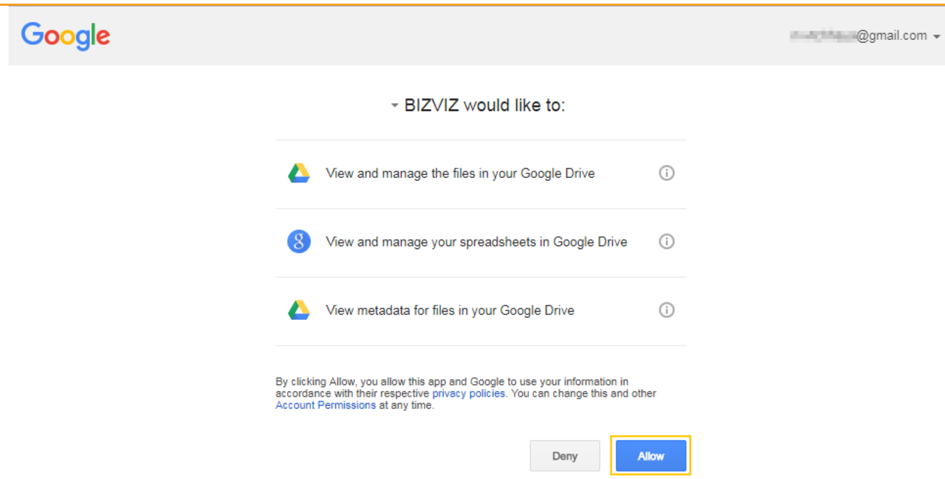


iv) Enter the credentials of a Google Account to sign in with your Google account.



v) A new page opens, asking the user to share their information with BizViz.

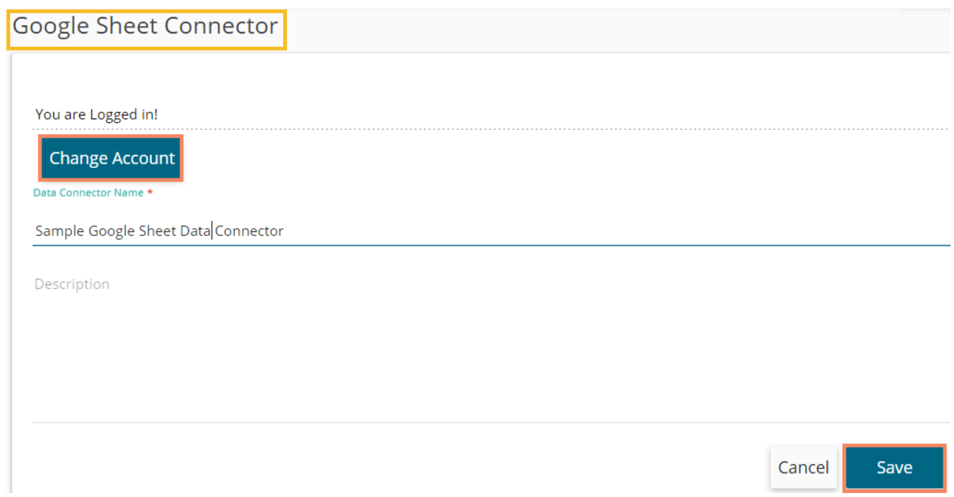
vi) Click the '**Allow**' option to share the same.



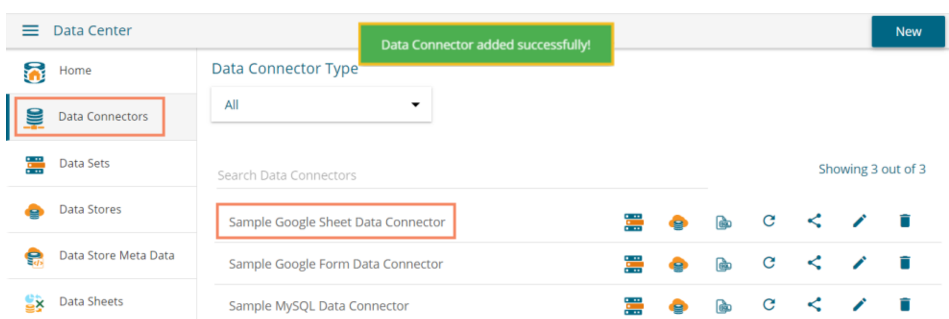
vii) The Google Sheet Connector page opens with the '**Change Account**' option indicating that a Google account has been selected.

viii) Provide a name for the Data Connector.

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



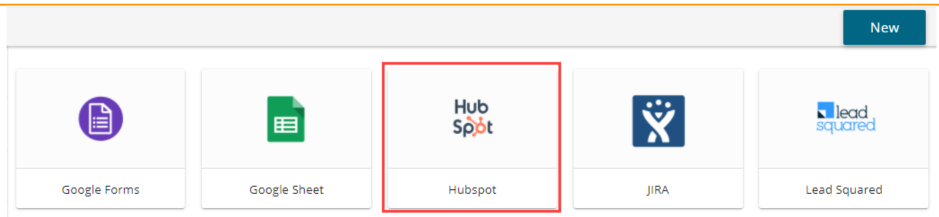
x) A success message appears, and the newly created Google Sheet data connector gets added to the Data Connectors list.



6.1.2.28. HubSpot

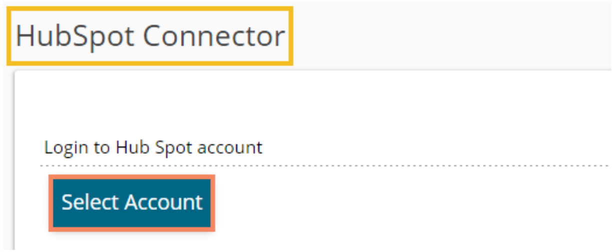
The following set of steps displays how to create a HubSpot Data Connector.

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

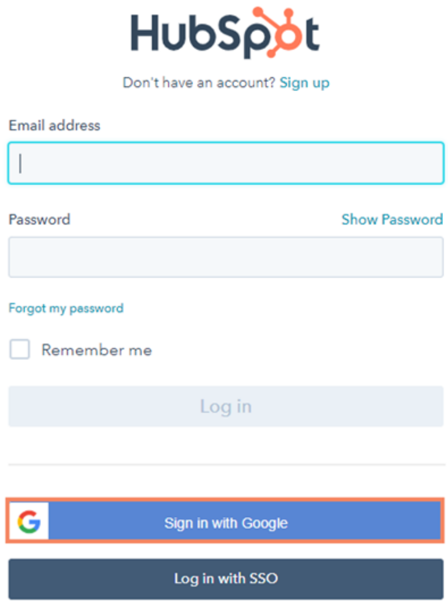


ii) The HubSpot Data Connector page opens.

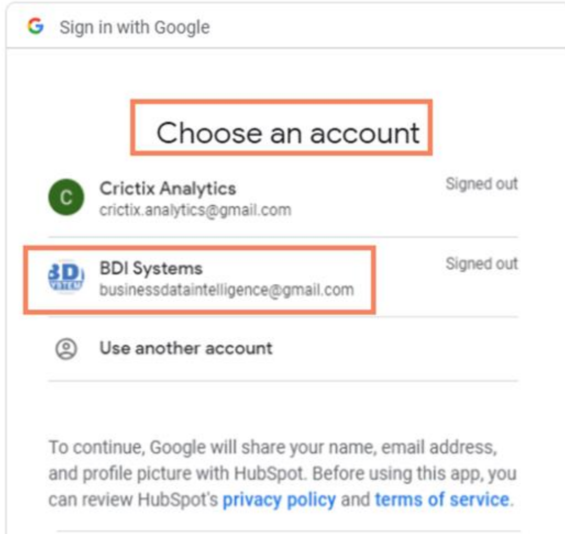
iii) The user needs to login to a Hub Spot account by clicking on the '**Select Account**' option.



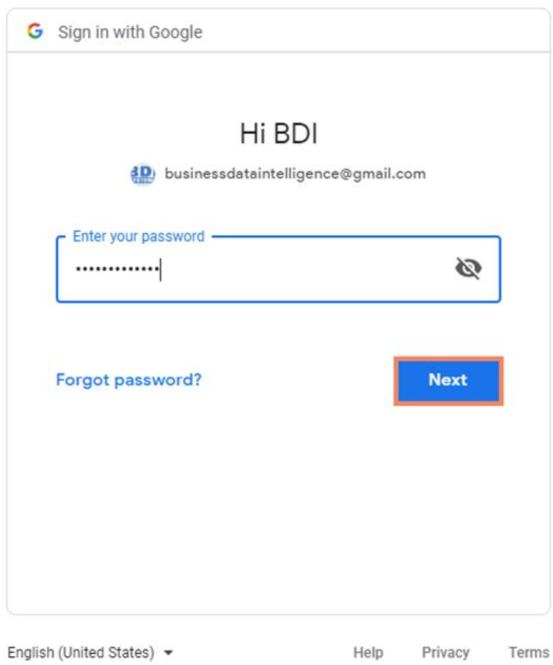
iv) A new page opens asking the credentials to log in to a HubSpot account. Since we are using Google credentials, so need to choose the '**Sign in with Google**' option.



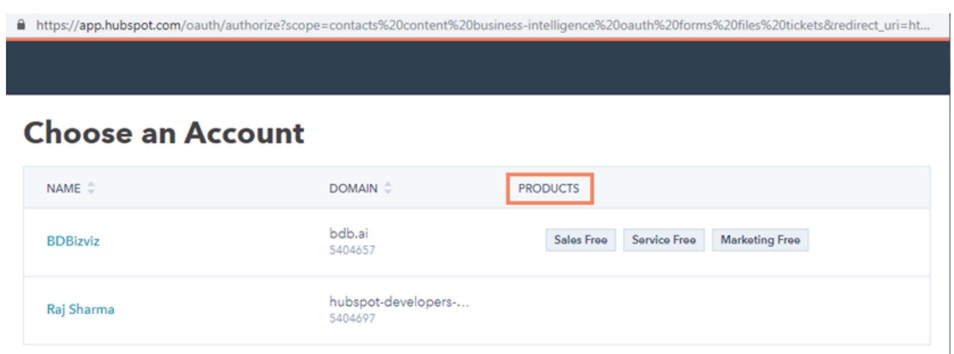
v) Choose a Google Account from the listed accounts.



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



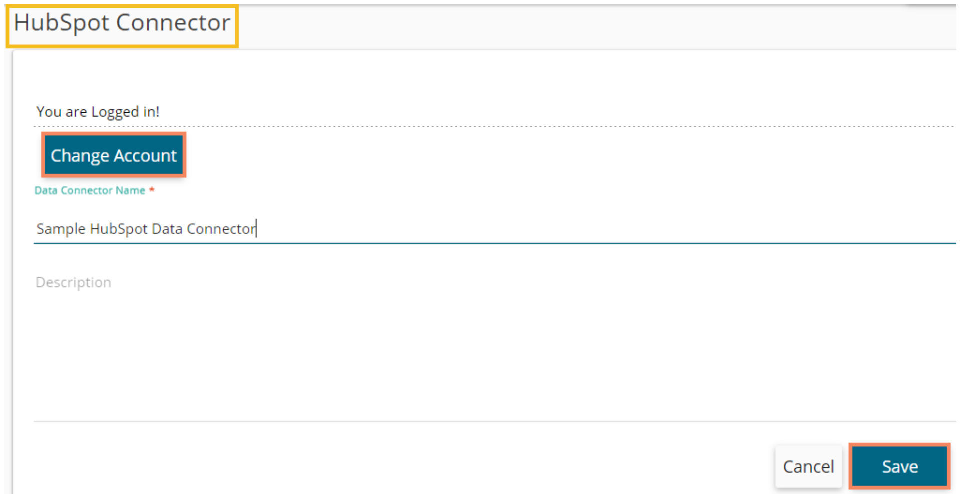
viii) Choose an option from the given choices under the PRODUCTS option.



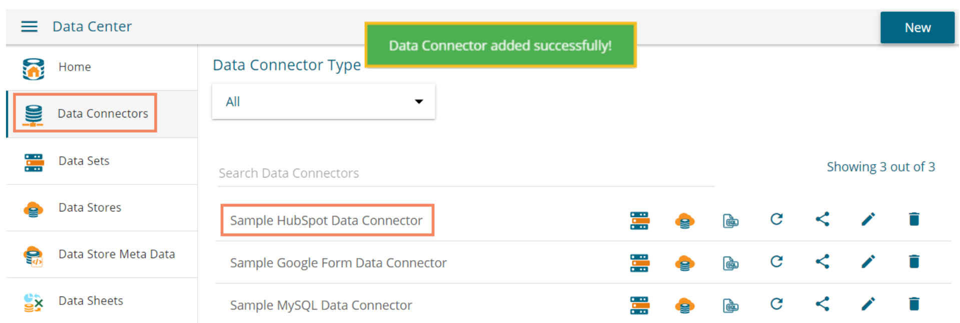
ix) The HubSpot Data Connector page opens with the ‘**Change Account**’ option and a notification indicating that the user has successfully logged in to the selected account.

x) Provide a name for the HubSpot Data Connector.

xi) Click the ‘**Save**’ option.



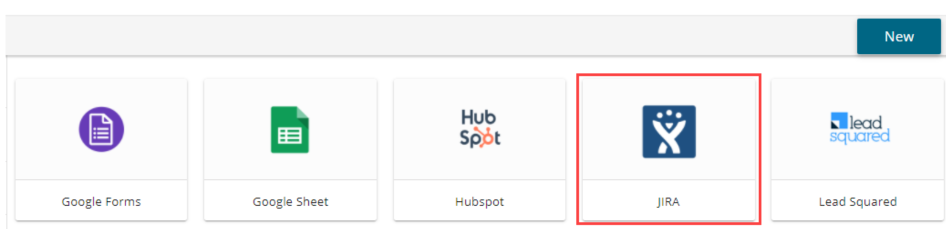
xii) A success message appears, and the newly created HubSpot Data Connector gets added to the Data Connectors list.



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.



ii) The ‘**JIRA Data Connector**’ page opens.

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

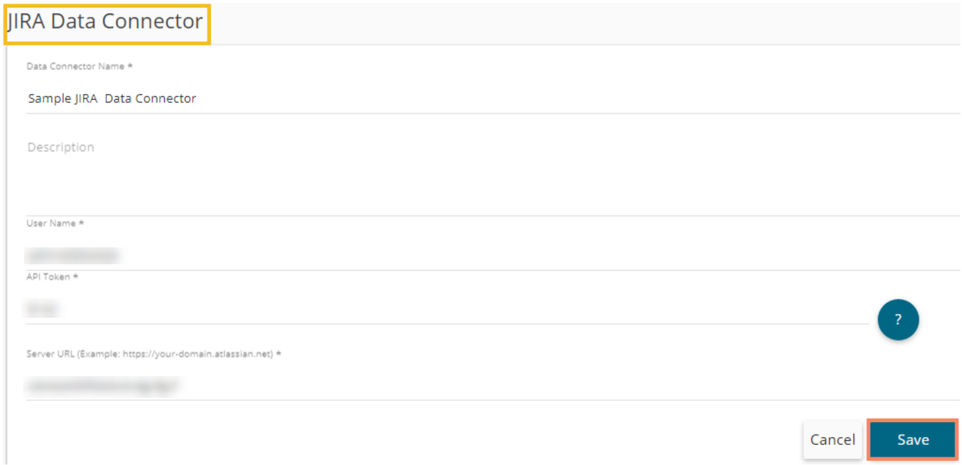
iv) **Description:** Describe the data connection.

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.

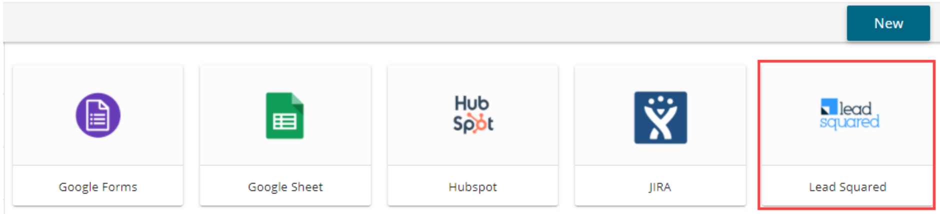


ix) A success message appears, and the newly created JIRA data connector gets added to the Data Connector list.

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.

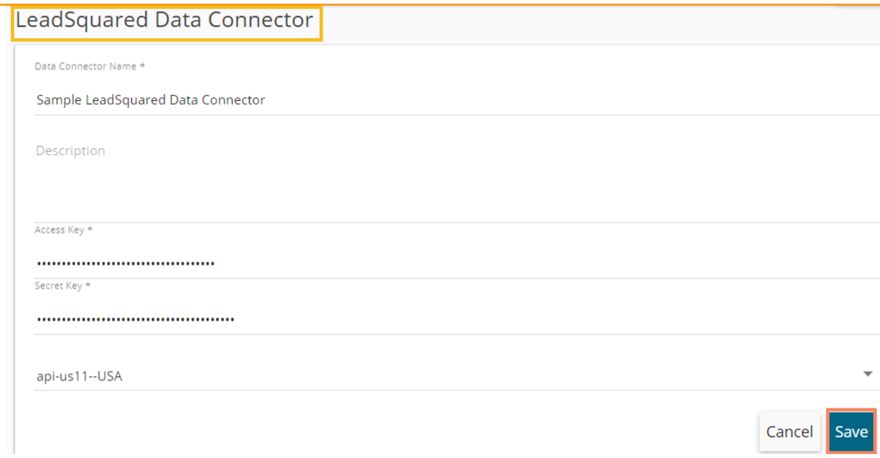


ii) The Lead Squared Data Connector page opens.

iii) Provide the following information:

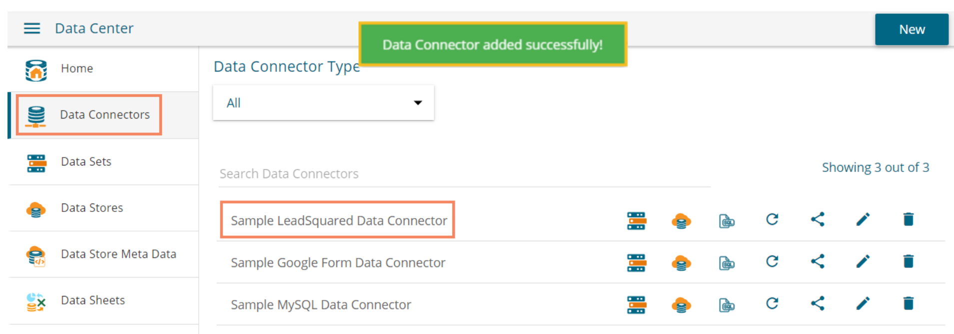
a. Data Connector name
b. Description
c. Access Key
d. Secret Key
e. Region Type
f. Database Name

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



v) A message appears to assure successful authentication.

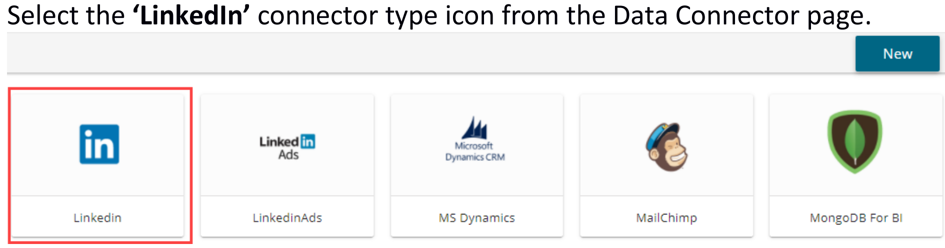
vi) Another success message appears, and the newly created Leadsquared data connector gets added to the Data Connectors list.



6.1.2.31. LinkedIn

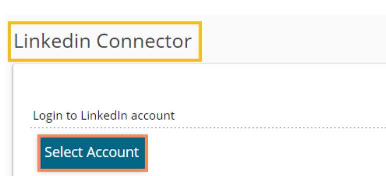
The following set of steps displays how to create a LinkedIn Data Connector.

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

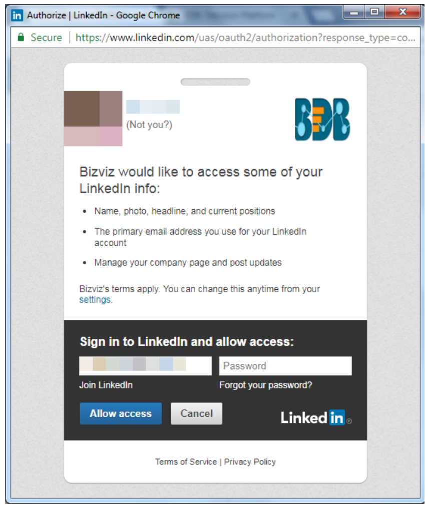


ii) The LinkedIn Connector page opens.

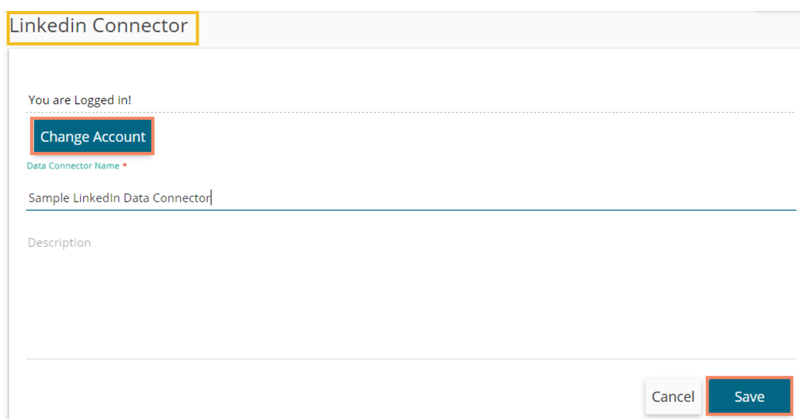
iii) Click the '**Select Account**' option.



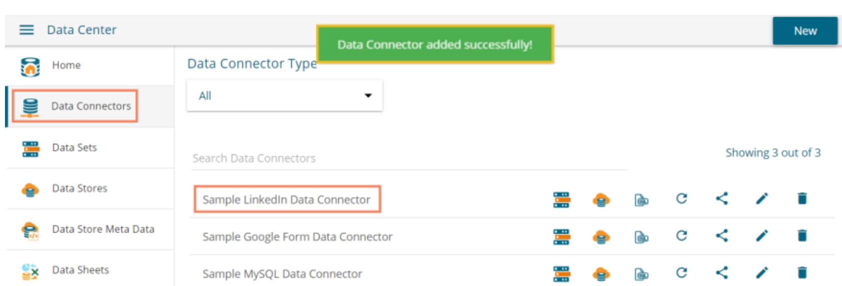
iv) The user gets redirected to a new window to login to a valid LinkedIn account.
v) Insert the credentials of the LinkedIn account to log in.
vi) Click the ‘**Allow access**’ option to provide permission to BDB for accessing data from the selected LinkedIn account.



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.



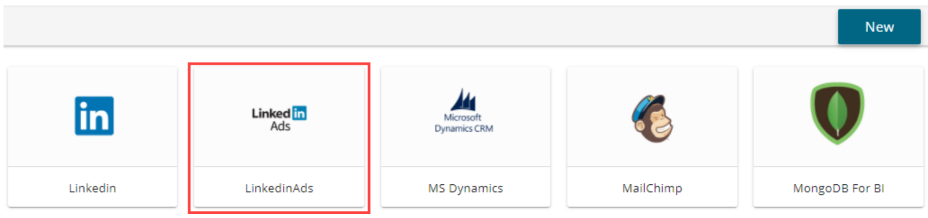
x) A success message appears, and the newly created data connector gets added to the Data Connectors list.



6.1.2.32. LinkedIn Ads

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

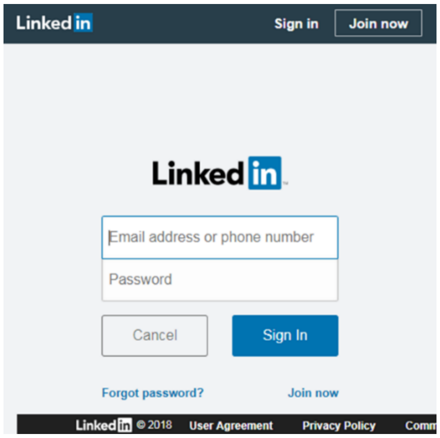
i) Click the '**LinkedIn Ads**' Data Connector type icon from the Data Connector page.



ii) The user gets directed to the LinkedIn Ads Data Connector page.

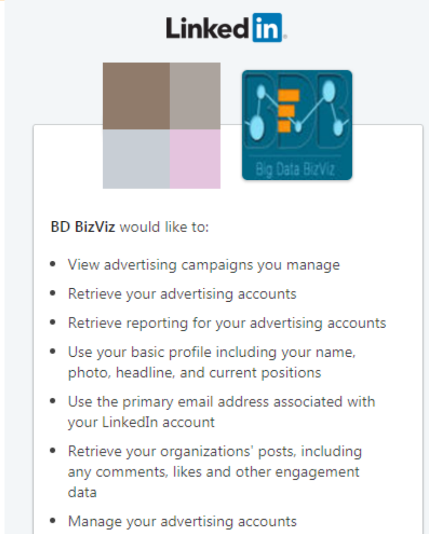
iii) Select an account or add a new account using the drop-down menu.

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

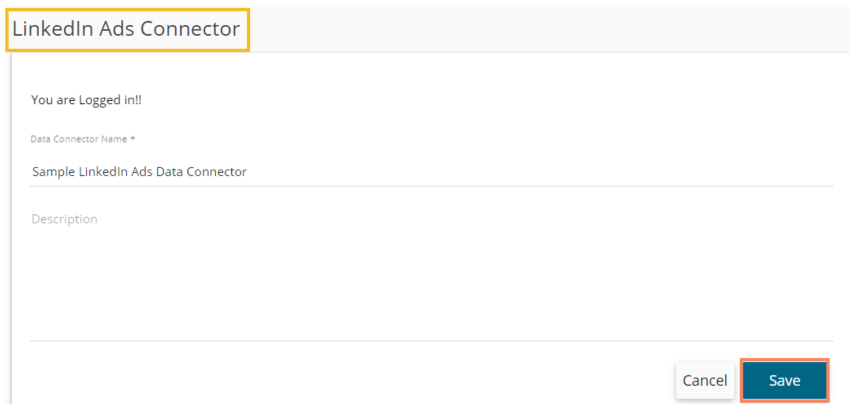


v) A new page opens, asking permission for BDB to access data from the selected LinkedIn account.

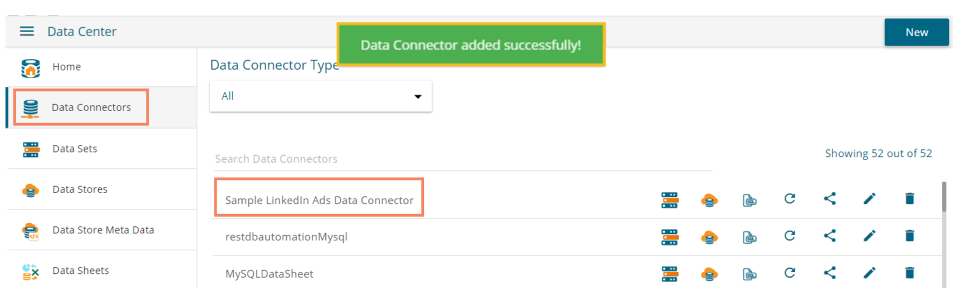
vi) Click the '**Allow**' option to give data access permission.



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.



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



6.1.2.33. MS Dynamics

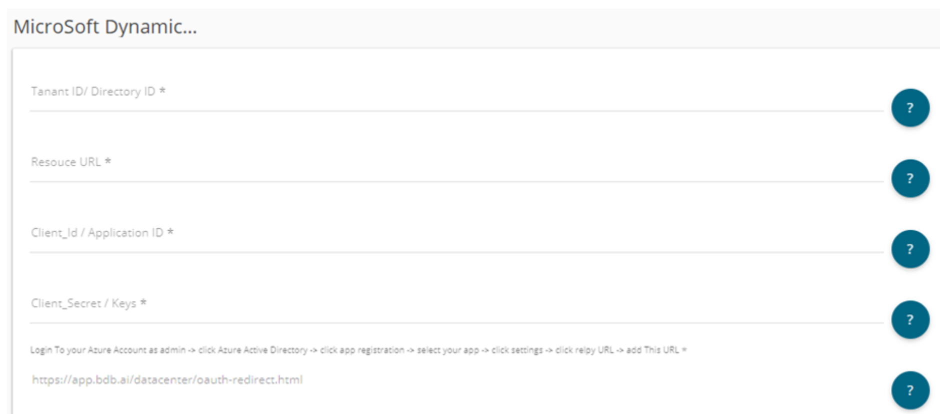
The following set of steps displays how to create an MS Dynamics Data Connector.

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 (https://app.bdb.ai/datacenter/oauth-redirect.html)

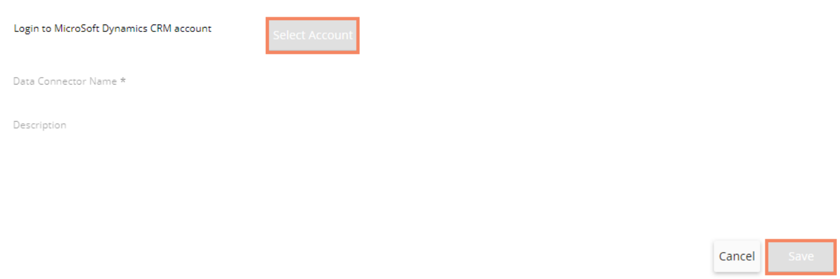


iv) A new page opens asking to log in to the Microsoft Dynamics CRM account by using the ‘**Select Account**’ option.

v) Provide the Data Connector Name.

vi) Describe the Data Connection (optional).

vii) Click the ‘**Save**’ option.

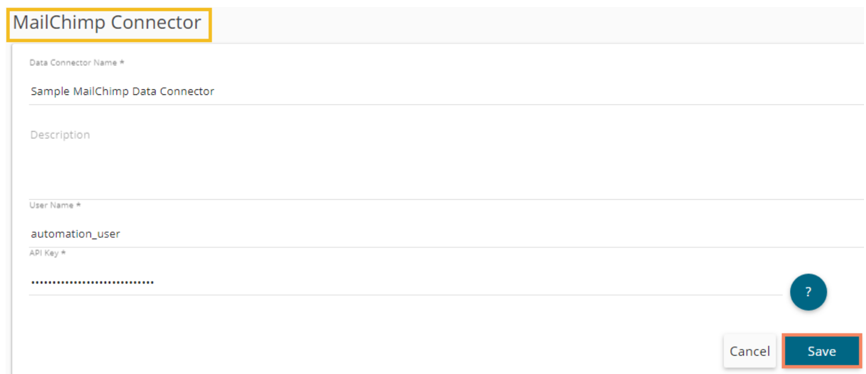


viii) A success message appears, and the newly created Microsoft Dynamics Data Connector gets added to the Data Connectors list.

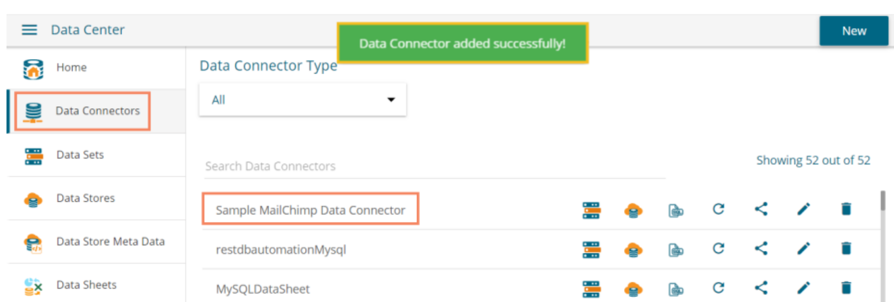
6.1.2.34. MailChimp

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.

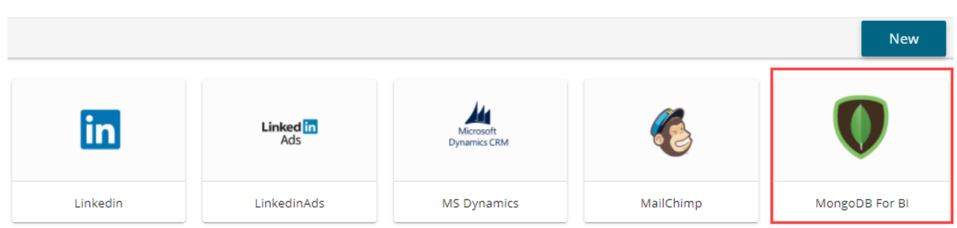


v) A success message appears, and the newly created MailChimp Data Connector gets added to the Data Connectors list.

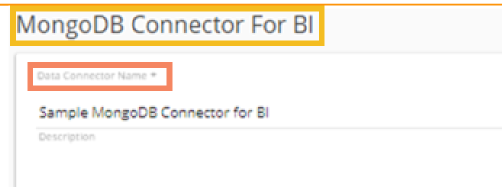


6.1.2.35. Mongo DB for BI

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

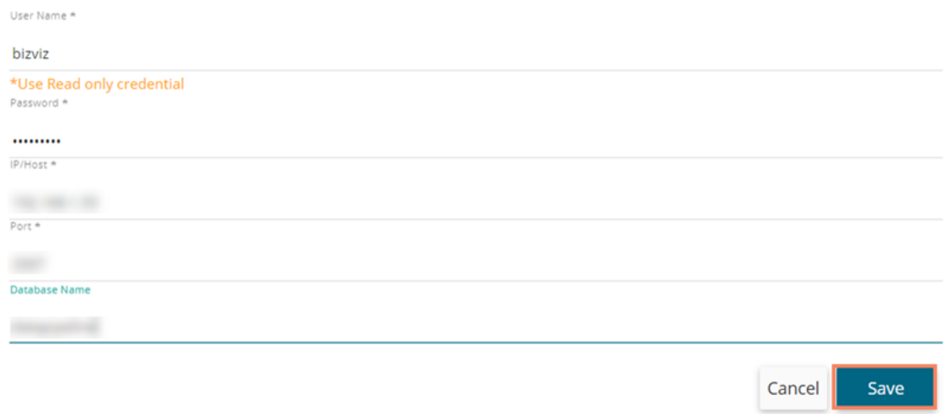


ii) The '**MongoDB Connector for BI**' connector page opens.
iii) Provide a name for the data connector.

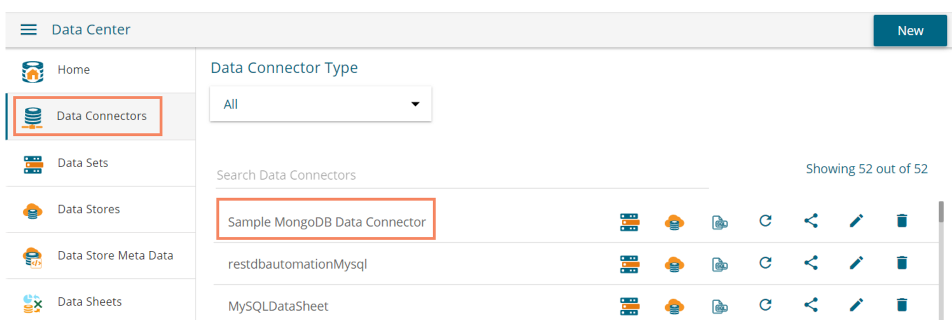


iv) Provide the following information:
   a. Username
   b. Password
   c. IP/Host address
   d. Port number
   e. Databased Name

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



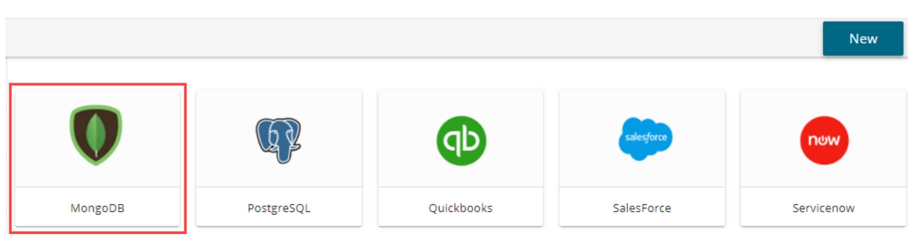
vi) A success message appears, and the newly created Mongo DB Connector gets added to the Data Connectors list.



6.1.2.36. Mongo DB

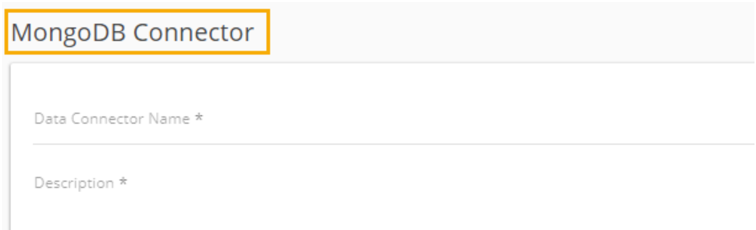
The following set of steps displays how to create a Mongo DB Data Connector.

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.



iv) Provide the following information:

a. Connector Type: Select an option out of **Standard** or **SRV**

b. Username

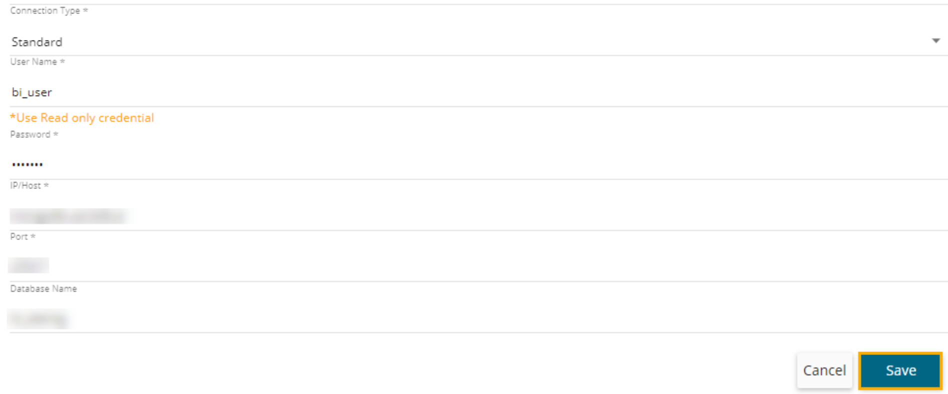
c. Password

d. IP/Host address

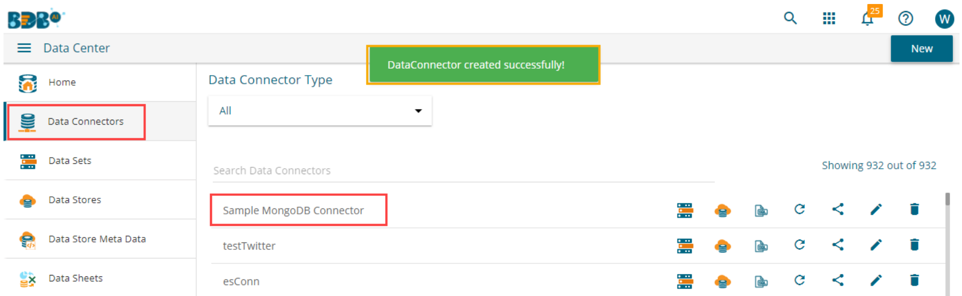
e. Port number

f. Database Name

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



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



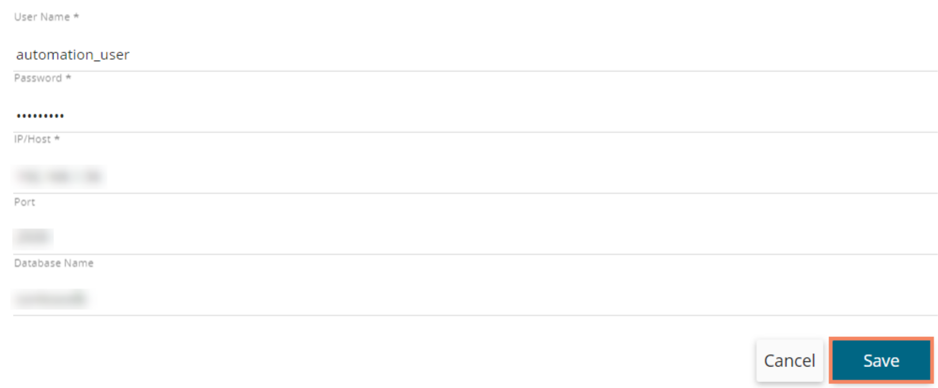
6.1.2.37. Postgre SQL

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.

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

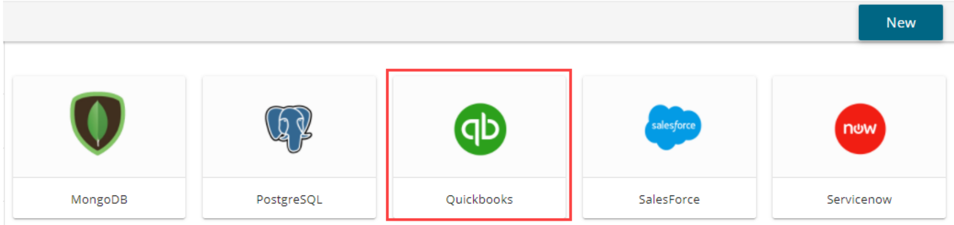


vii) A success message appears, and the newly created PostgreSQL data connector gets added to the Data Connectors list.

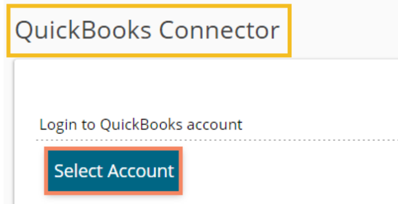
6.1.2.38. QuickBooks

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

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

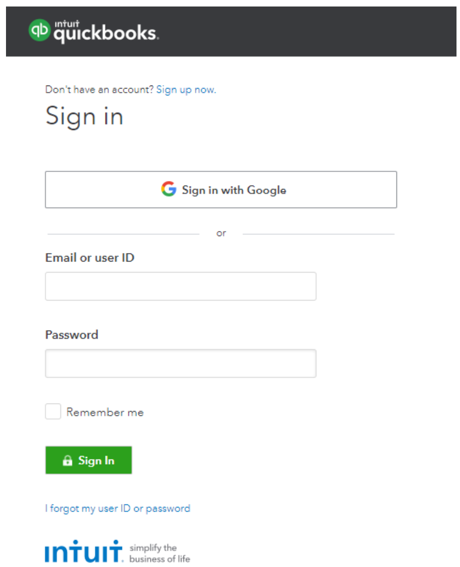


ii) The QuickBooks Connector page opens.
iii) Click the '**Select Account**' option for login to a QuickBooks account.

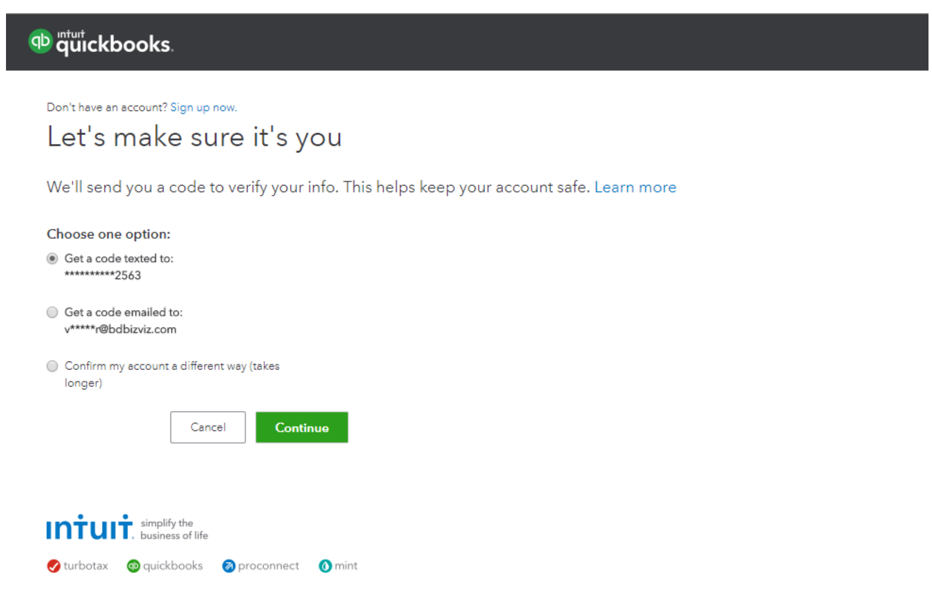


iv) The '**Sign in**' page of the QuickBooks opens.

v) Enter the credentials to Sign in.



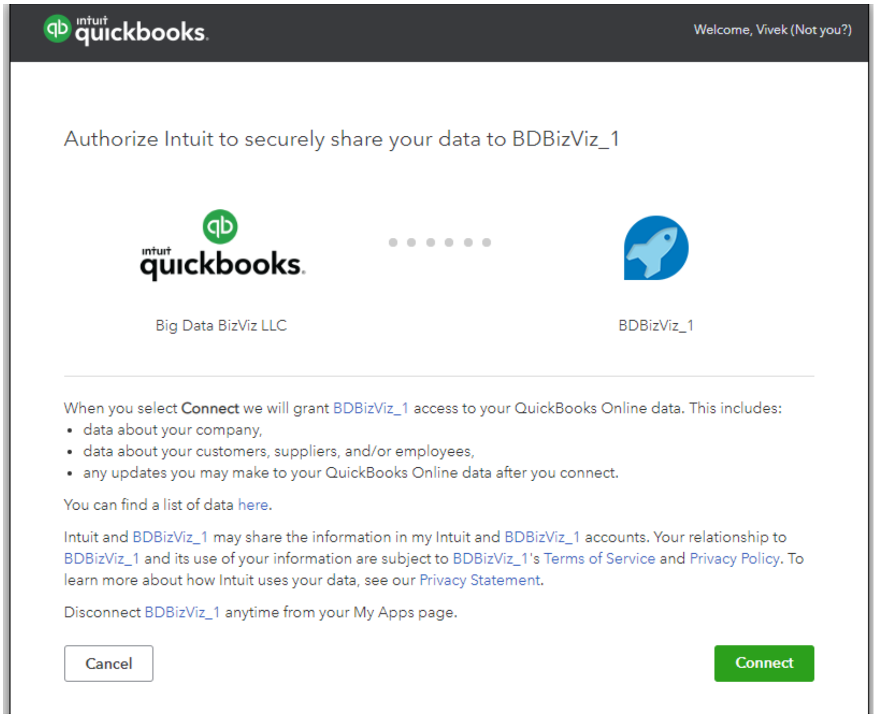
vi) The user receives a code to assure the authenticity of the selected account. The users get verification code through the registered email or mobile.



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

vii) After verifying the authenticity code, the user gets a new window asking to authorize BDBizViz.

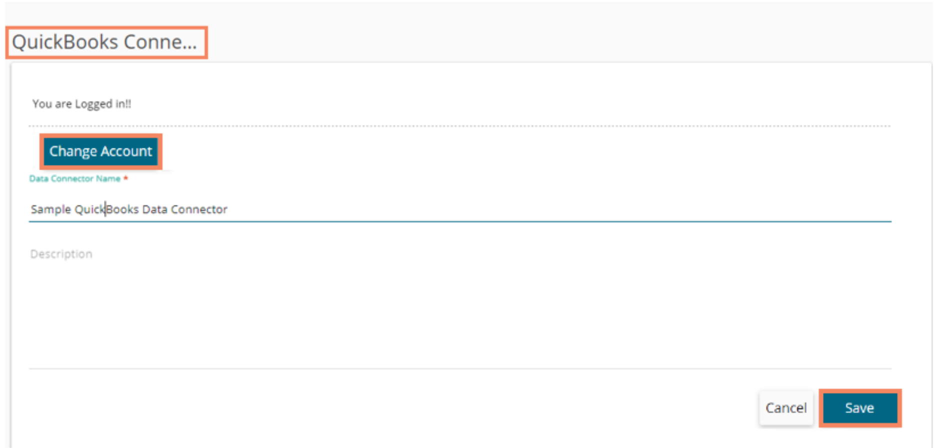
viii) Click the '**Connect**' option.



ix) The QuickBooks connector page 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.

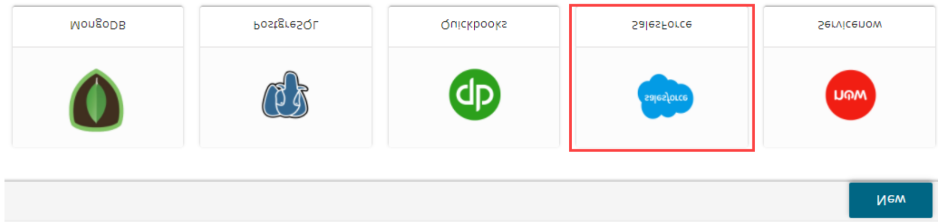


xii) A success message appears, and the newly created QuickBooks Connector gets added to the Data Connectors list.

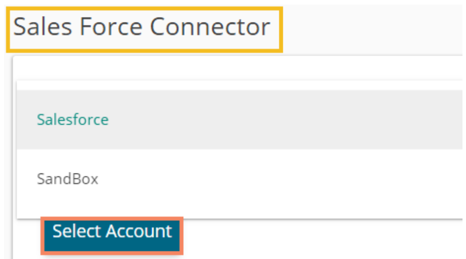
6.1.2.39. Salesforce

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

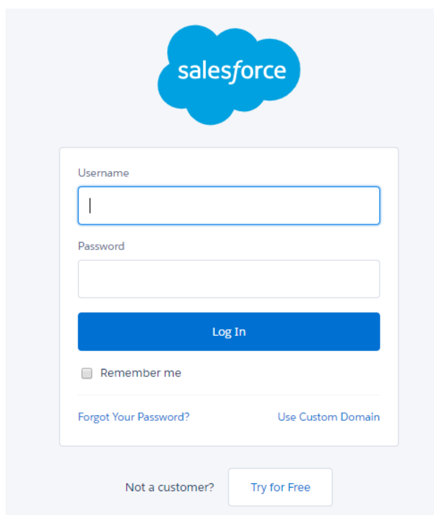
i) Select the '**Salesforce**' icon from the Data Connector page.



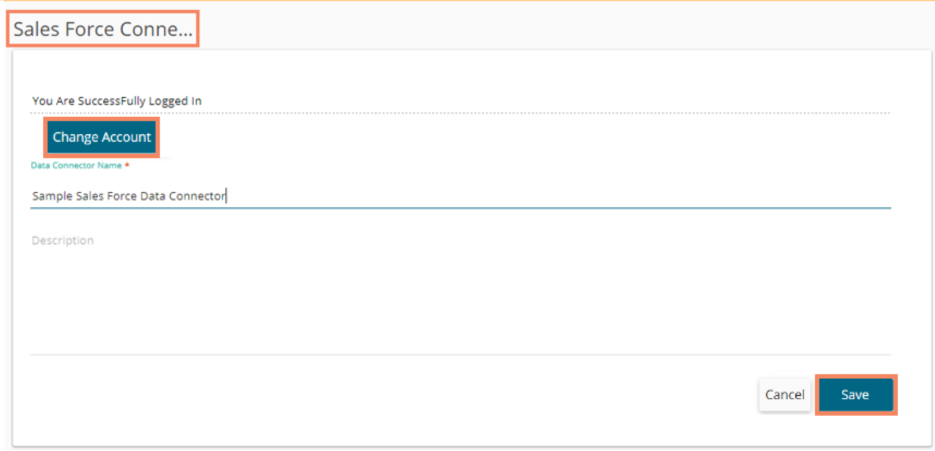
ii) The user gets directed to the Salesforce Connector page.
iii) Select an option using the drop-down list (Salesforce/Sandbox).
iv) Click the ‘**Select Account**’ option to select an account.



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



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.

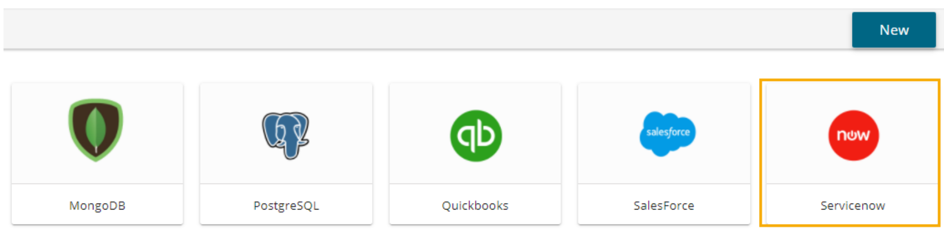


xii) A success message appears, and the newly created data connector gets added to the Data Connectors list.

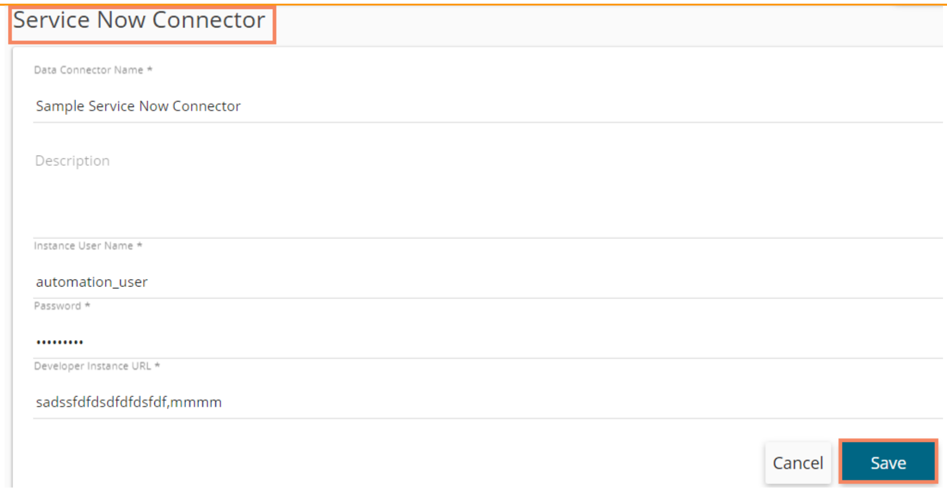
6.1.2.40. ServiceNow

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.

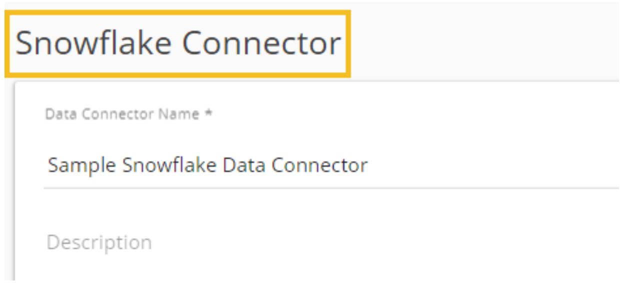


x) A success message appears, and the newly created ServiceNow data connector gets added to the Data Connectors list.

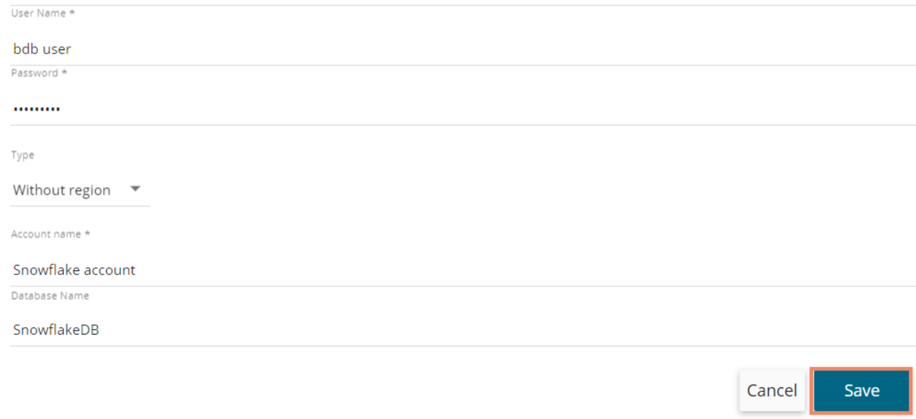
6.1.2.41. Snowflake

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).



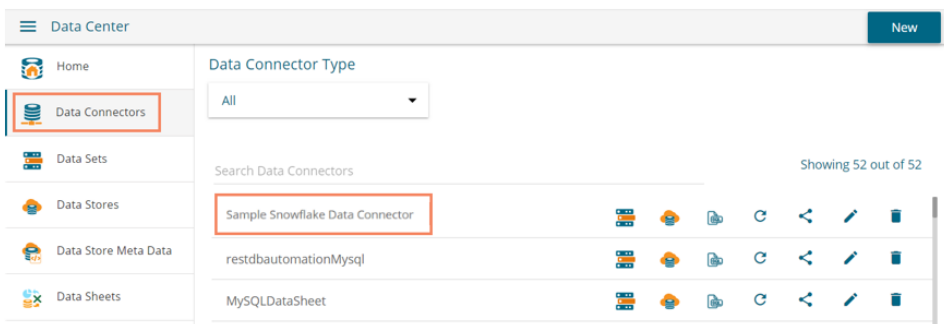
v) Enter the valid username.
vi) Enter the correct password for the selected account.
vii) Select a type by using the drop-down menu.
viii) Provide the account name.
ix) Provide the Database name.
x) Click the '**Save**' option.



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.



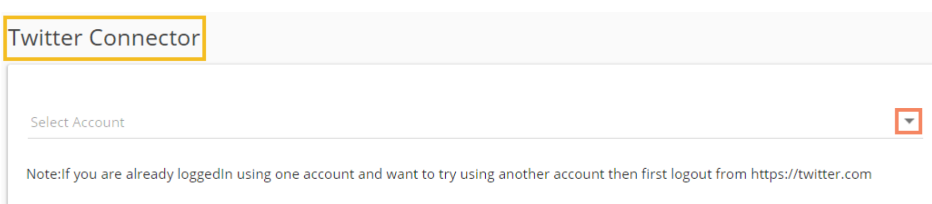
6.1.2.42. Twitter

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.

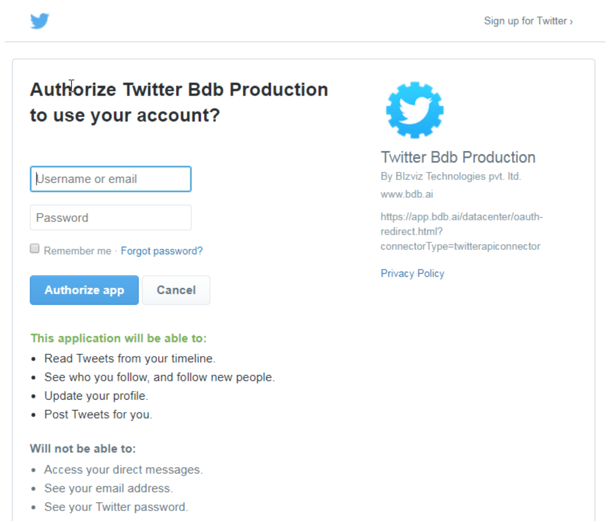
iii) Either select a Twitter account listed in the drop-down menu or add a new Twitter account (The steps displayed over here guides the user to add a new Twitter account).



iv) An authorization page opens.

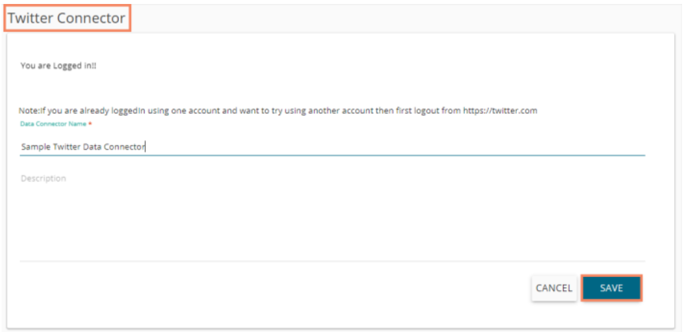
v) Enter the credentials to Sign in.

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

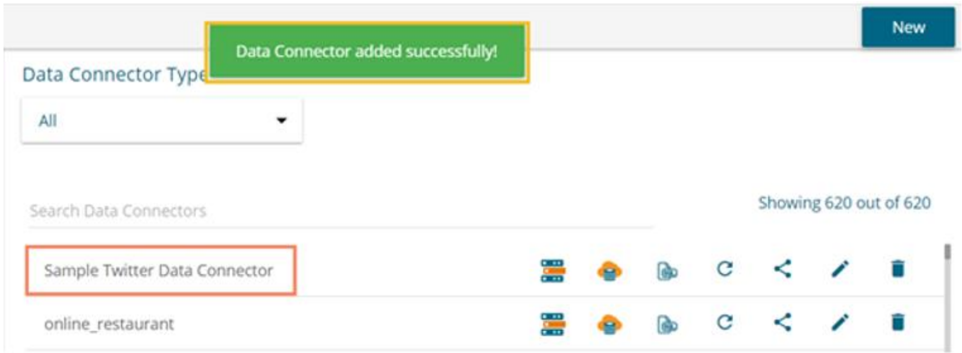


vii) Another page opens, asking permission to authorize Twitter BDB Production to use your account.

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.



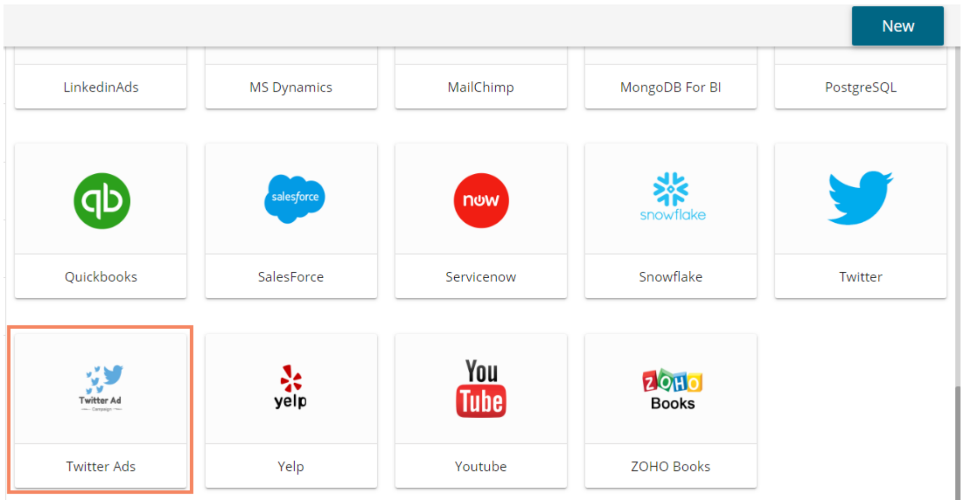
xii) A success message appears, and the newly created Twitter Connector gets added to the Data Connectors list.



6.1.2.43. Twitter Ads

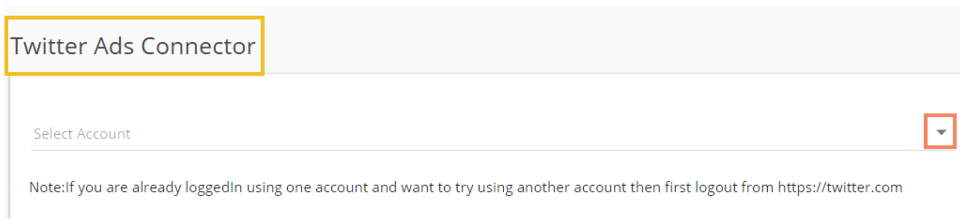
The following set of steps displays how to create a Twitter Ads data connector.

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



ii) The user gets directed to the Twitter Ads Data Connector page.

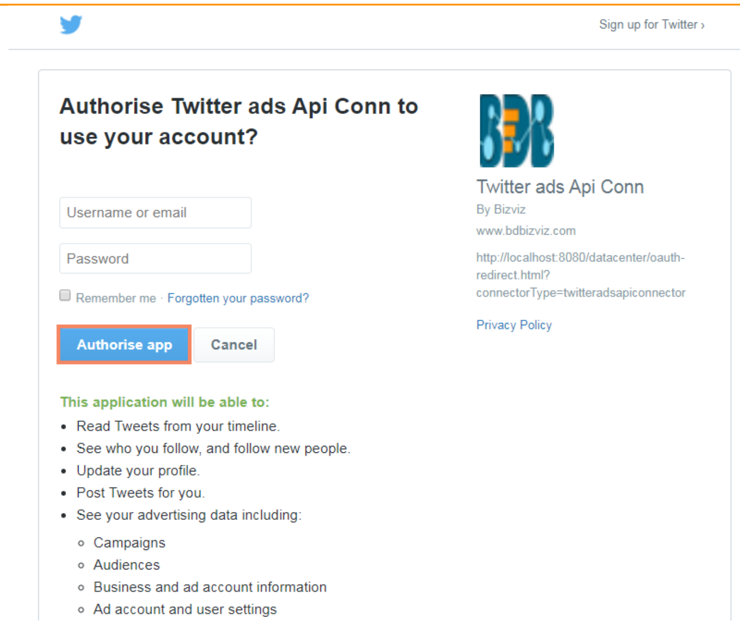
iii) Select an account or Add a new account using the drop-down menu (the steps given below guides the user to add a new Twitter account).



iv) An Authorization page opens.

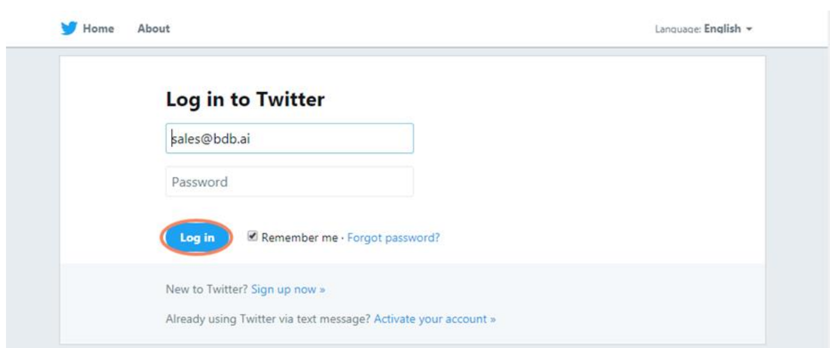
v) Provide the credentials to log in to the Twitter account.

vi) Click the '**Authorise app**' option.



vii) Another window opens to confirm the authorization process.

viii) Click the '**Authorise app**' option.

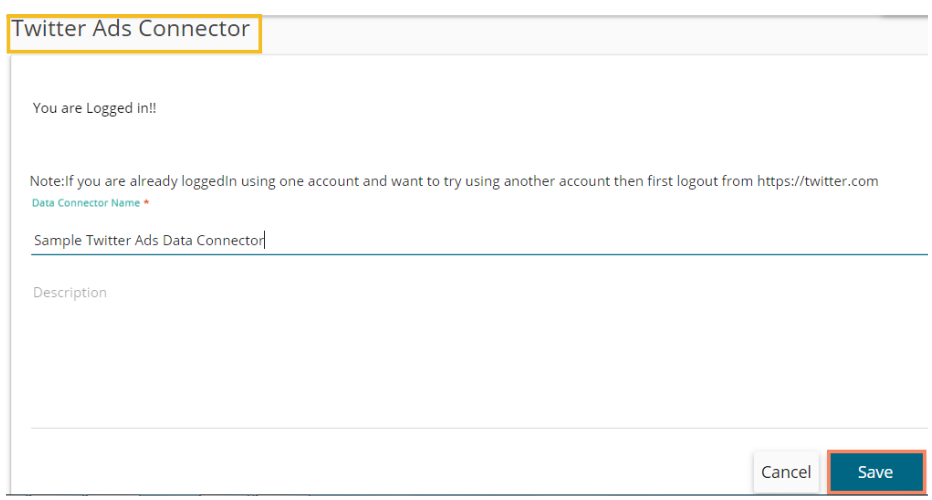


ix) The Twitter Ads Data Connector page opens with a notification that the user is successfully logged in to the selected account.

x) Provide the data connector name.

xi) Describe the data connector.

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



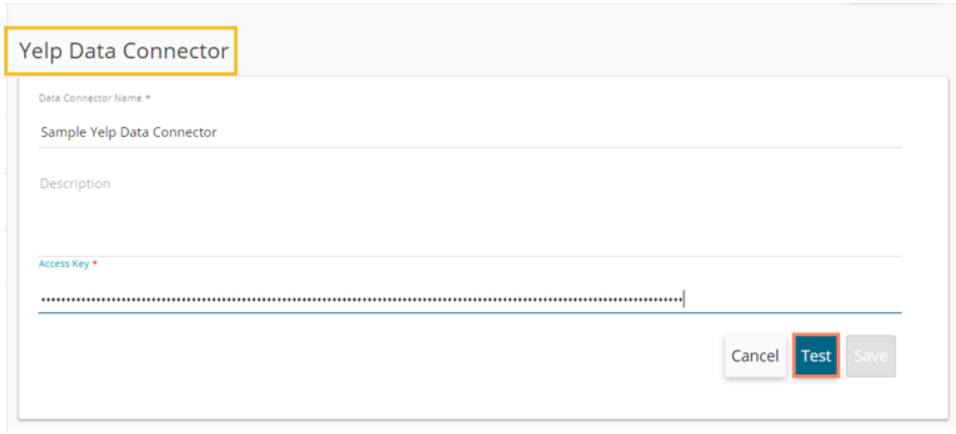
xiii) A success message appears, and the newly created Twitter Ads data connector gets added to the Data Connector List.

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.

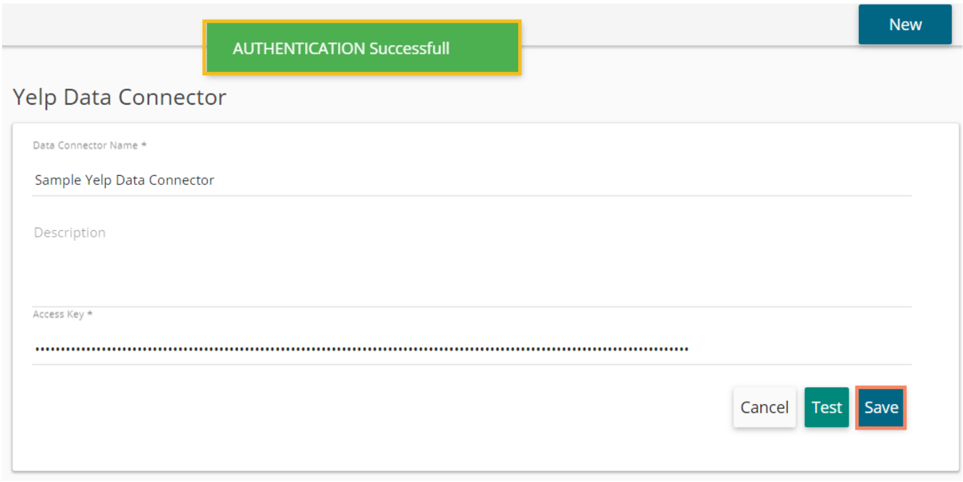
6.1.2.44. Yelp

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

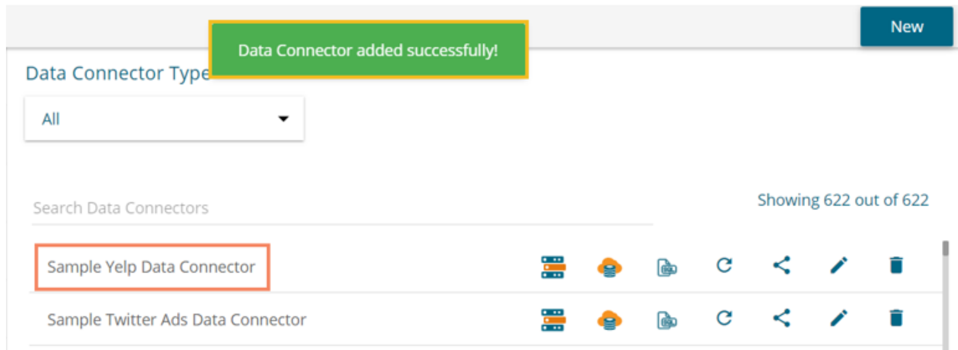
i) Click the '**Yelp**' Data Connector icon from the Data Connector page.
ii) The Yelp Data Connector page opens.
iii) Provide the following information to create the Data Connector:
   a. Data Connector Name
   b. Description
   c. Access Key
iv) Click the '**Test**' option.



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



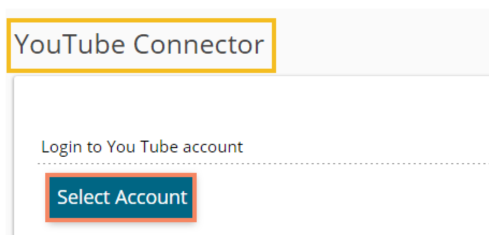
viii) A success message appears, and the newly created Yelp Data Connector gets added to the Data Connectors List.



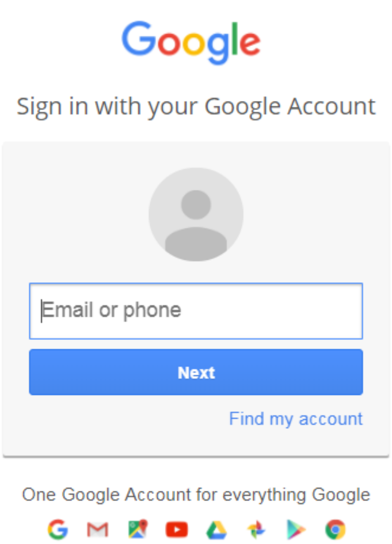
6.1.2.45. YouTube

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

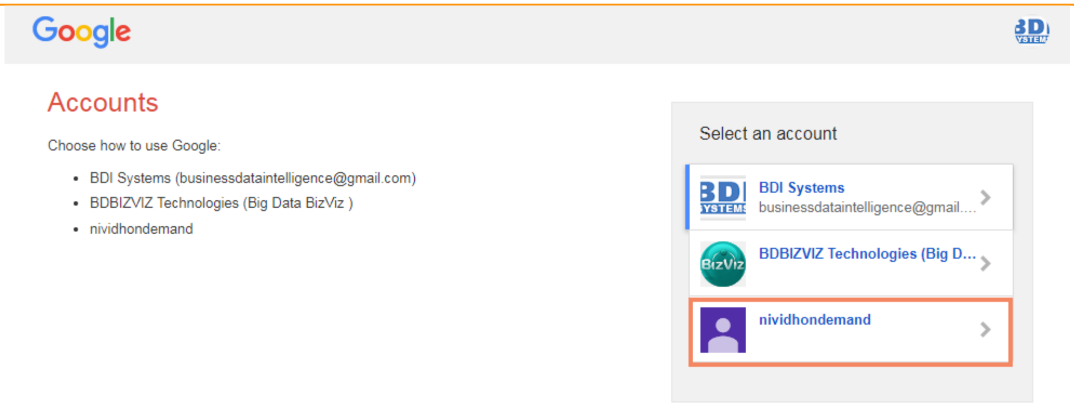
i) Click the '**YouTube'** Data Connector icon from the Data Connector page.
ii) The YouTube Data Connector page opens.
iii) Click the '**Select Account'** option.



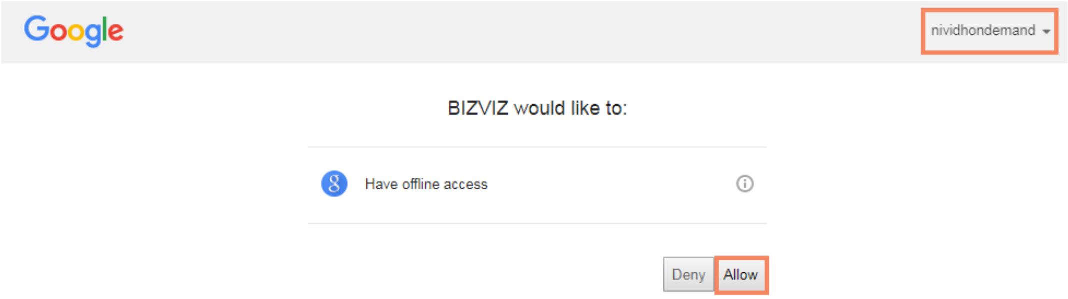
iv) A new page appears asking the credentials to log in to a Google account.



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



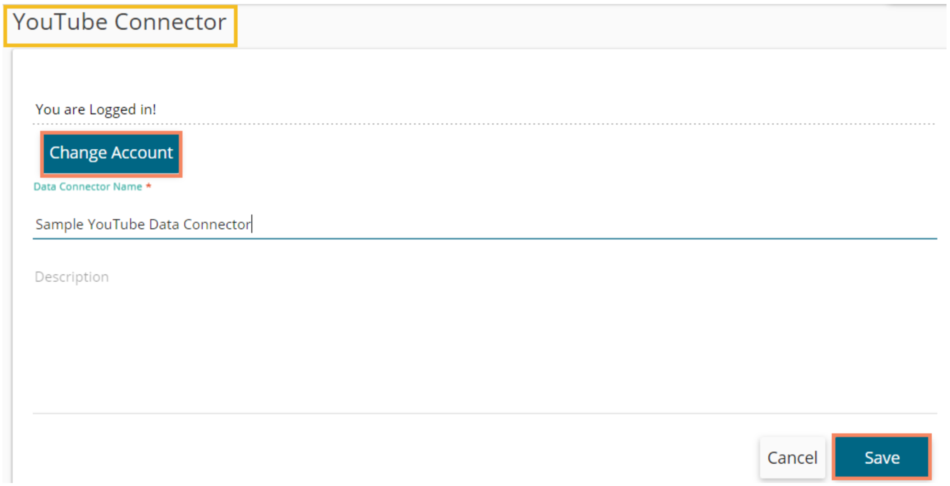
vi) Click the ‘**Allow**’ option to permit BDB to access YouTube data from the attached Google account.



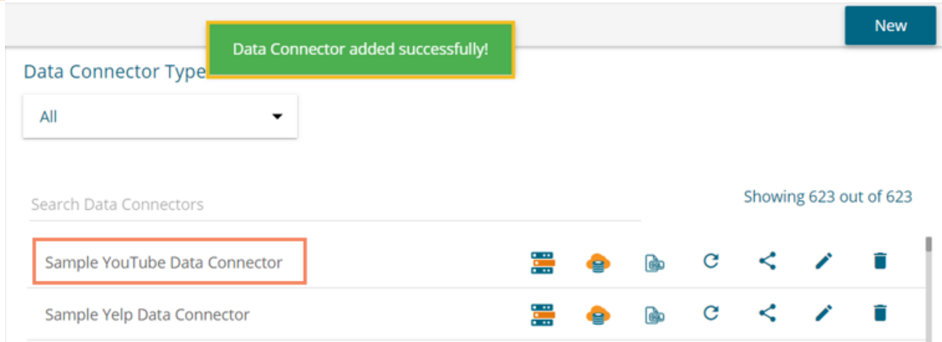
vii) The YouTube connector page opens with a notification that the user has been logged in to the selected Google account.

viii) Provide a title for the YouTube Data Connector.

ix) Click the ‘**Save**’ option to save the inserted information.



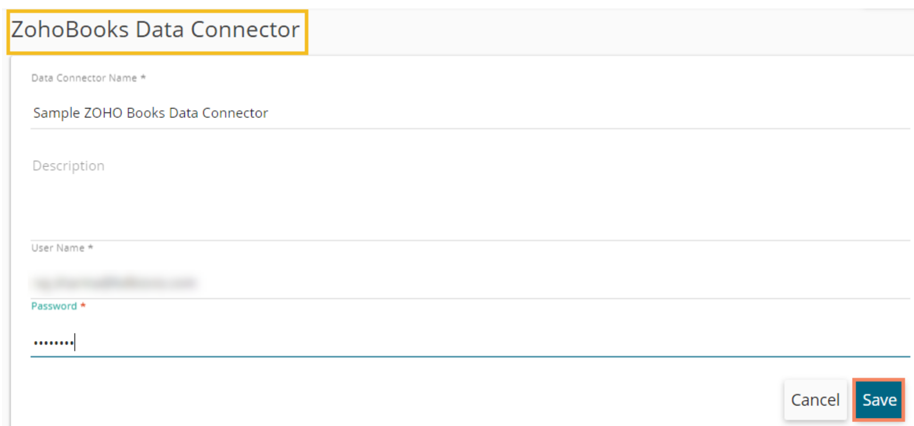
x) A success message appears, and the newly created YouTube Data Connector gets added to the Data Connectors list.



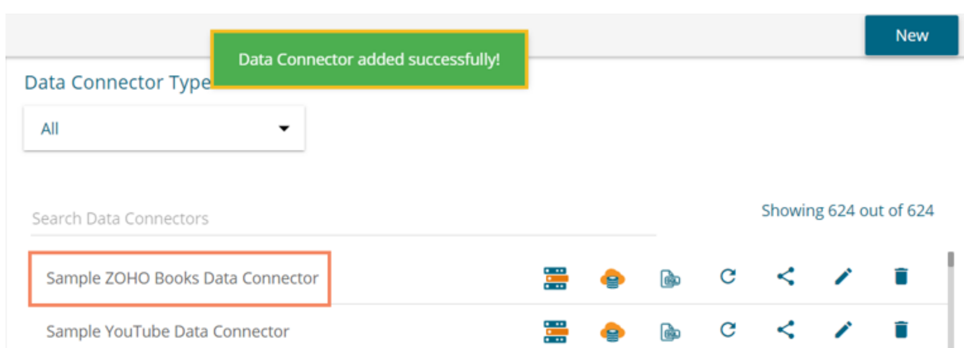
6.1.2.46. ZOHO Books

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.

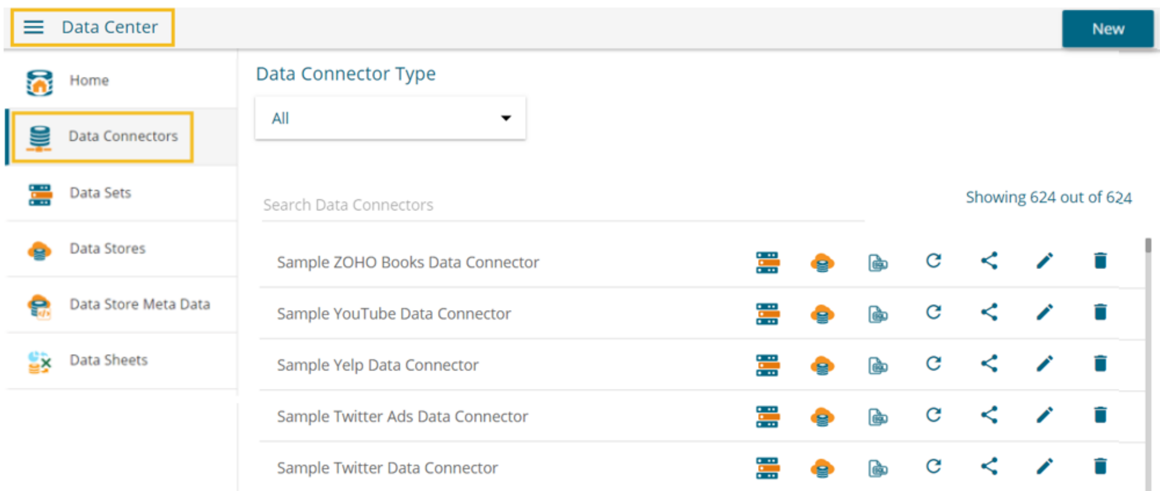


vi) A success message appears to assure the connection.
vii) Another success message appears, and the newly created ZOHO Books Connector gets added to the Data Connectors list.



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.

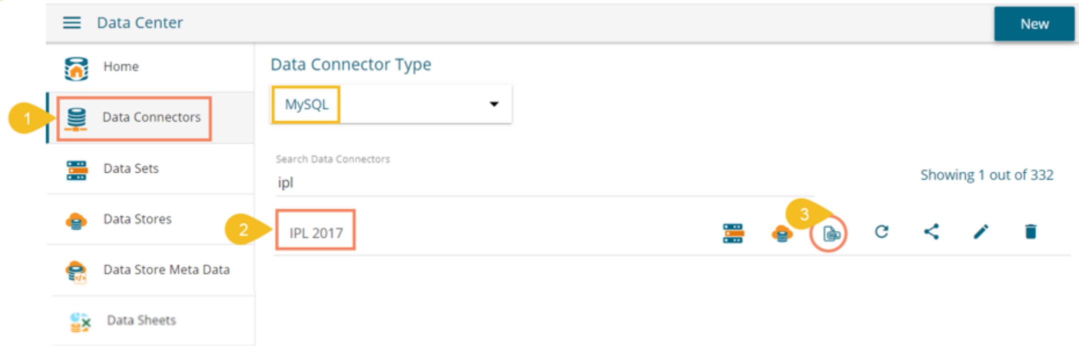


Option	Name	Task
	New Data Set	Redirects the user to create a new Data Set
	New Data Store	Redirects the user to create a new Data Store
	New Query Builder	Redirects the user to the Query Builder functionality
	Reconnect	Reconnects to the server
	Share	Shares connector with the selected user(s) or group(s)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

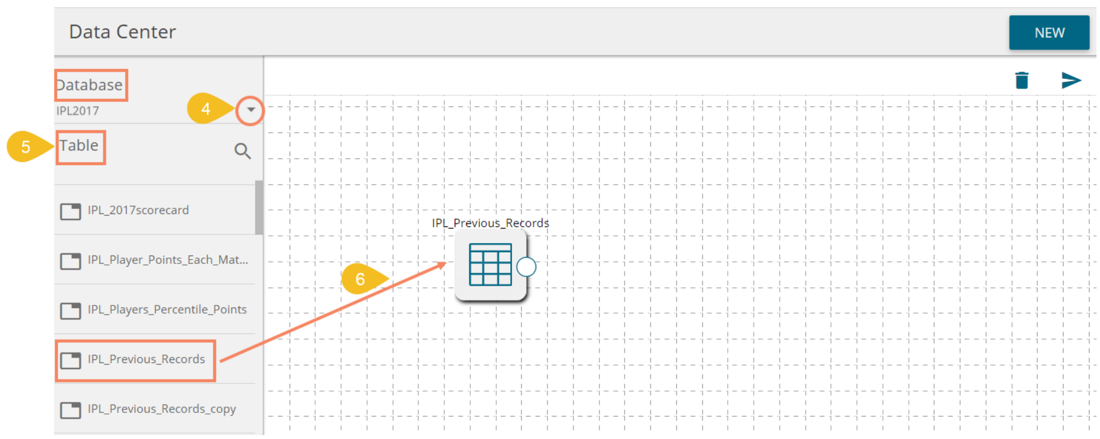
6.1.4. Creating Data Store/Data Set by using Query Builder

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.

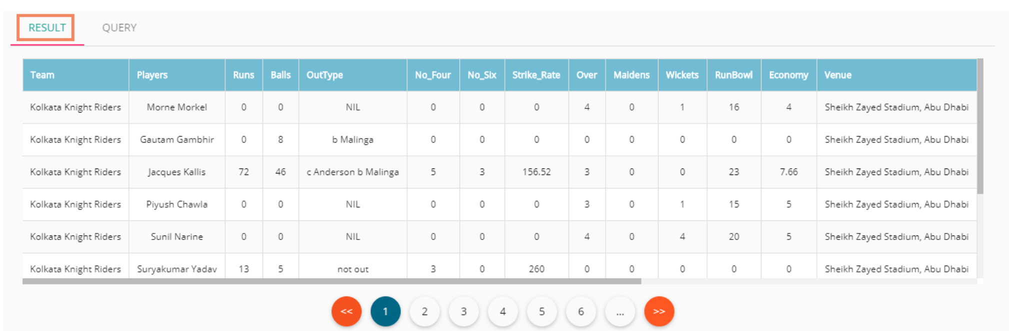


iv) A new page opens, redirecting the user to select a database.
v) A list of the existing tables appears from the selected database.
vi) Drag-drop a database table to the workspace (The users can drag multiple tables to the workspace).



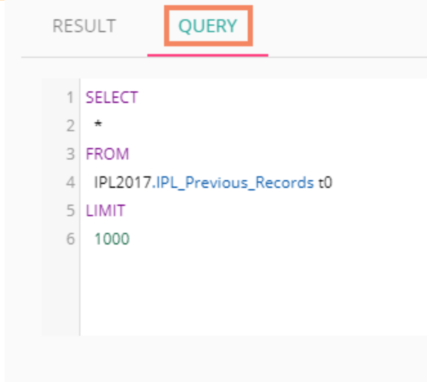
vii) Click the '**Execute Query**' icon.
viii) The requested data gets sent to the server, and the result displays on the screen with two tabs - one for showing the query result, and the other displays the generated query itself.

1. The '**RESULT**' tab opens by default with the preview of the data.

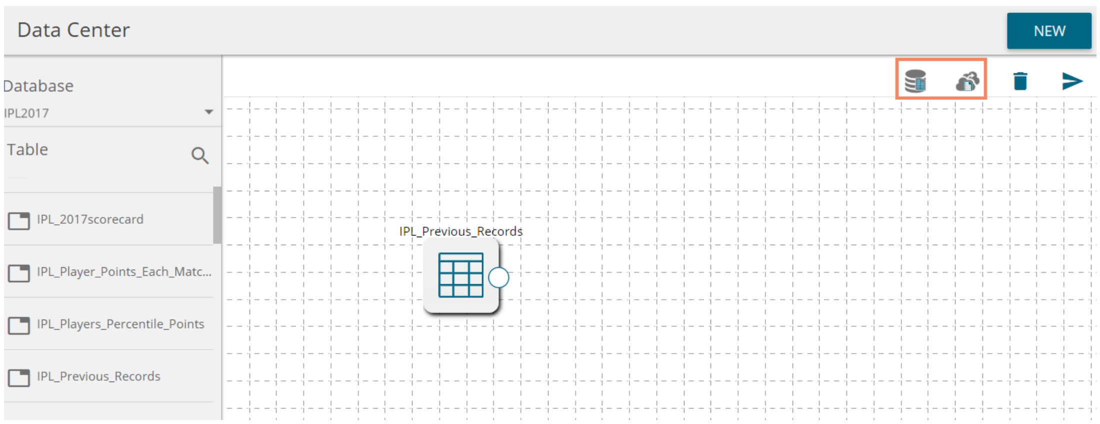


Team	Players	Runs	Balls	OutType	No_Four	No_Six	Strike_Rate	Over	Maidens	Wickets	RunBowl	Economy	Venue
Kolkata Knight Riders	Morne Morkel	0	0	NIL	0	0	0	4	0	1	16	4	Sheikh Zayed Stadium, Abu Dhabi
Kolkata Knight Riders	Gautam Gambhir	0	8	b Malinga	0	0	0	0	0	0	0	0	Sheikh Zayed Stadium, Abu Dhabi
Kolkata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

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



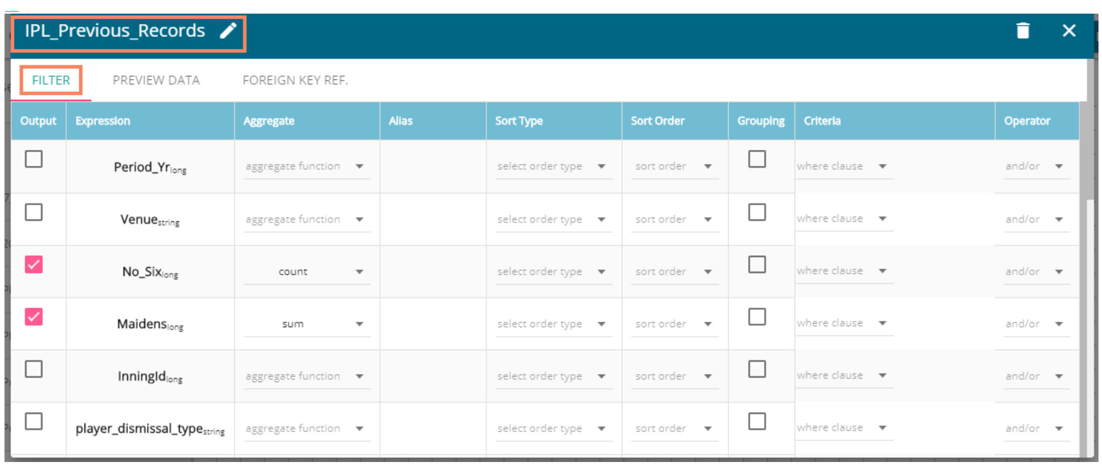
ix) After executing the query, the user gets two more options to ‘**Create Data Set**’ and ‘**Create Data Store**’ from the generated query.



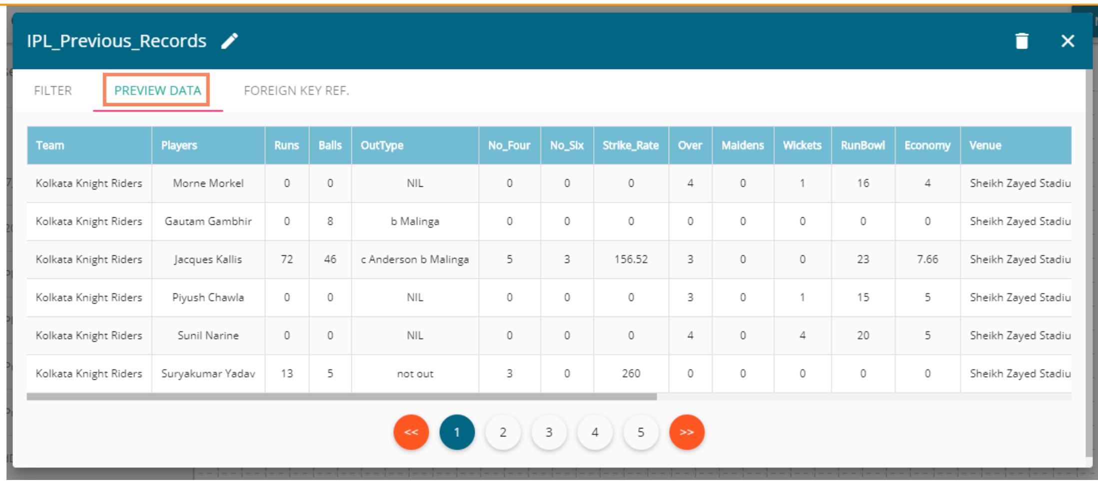
x) The users can click the dragged table component.

xi) A new page opens with FILTER, PREVIEW DATA, and FOREIGN KEY REF tabs

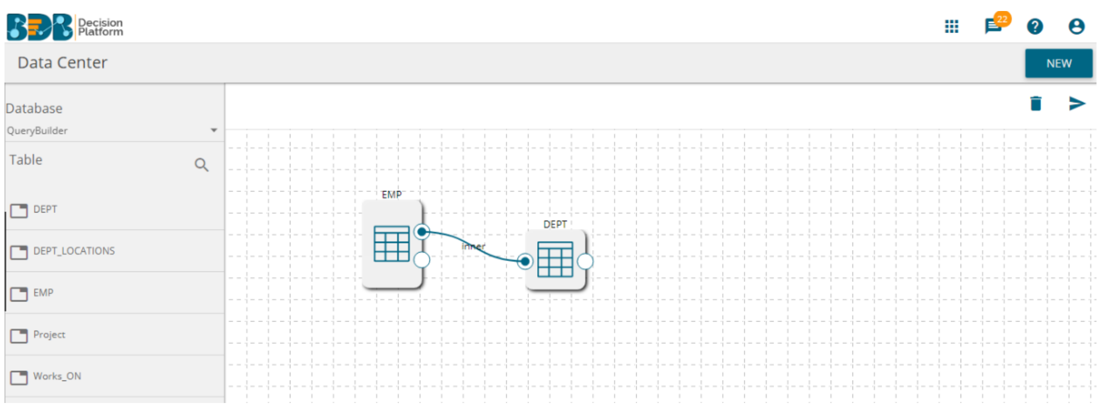
1. The FILTER tab displays various columns heading with Selectors/Expressions, Aggregate Functions, Alias Column Names, Sort Type, Sort Order, Grouping, Criteria (Where Condition), and Operator to the user.
   The user can get filtered data by selecting the columns using the checkboxes provided next to the columns.



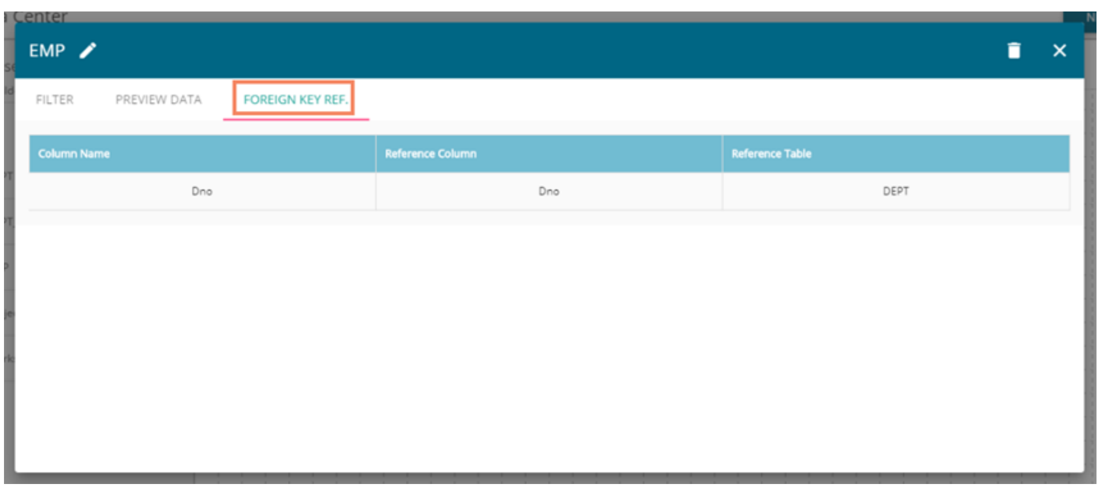
2. PREVIEW DATA - This tab displays sample data that can be used by the user to decide what type of data is present in the table and accordingly, conditions get created.



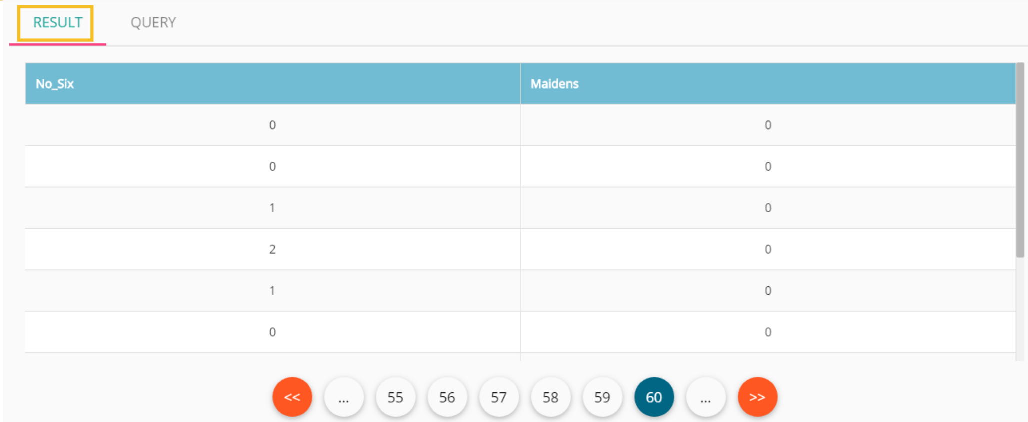
3. FOREIGN KEY REF. - This tab provides foreign key references for the table. It can be used by the user while creating join conditions.
   E.g., In the below given image, EMP and DEPT tables are joined based on a similar column 'Dno.'



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

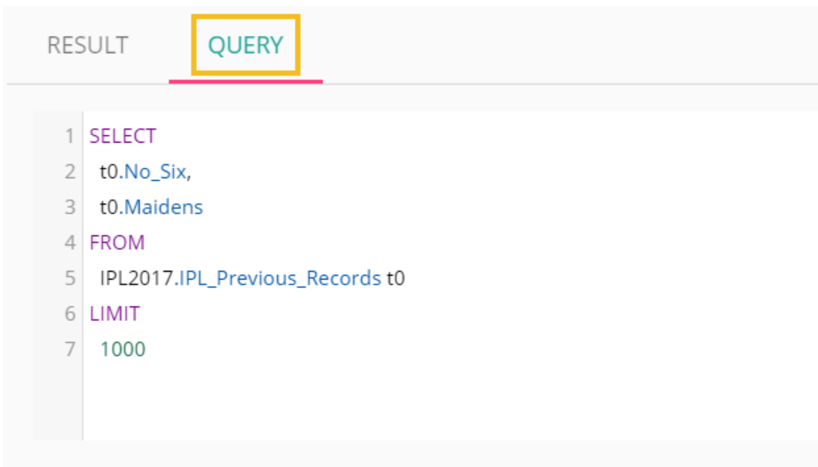


xii) Click the '**execute query**' icon.
xiii) A window pan opens, displaying the '**Result**' tab by default.



No_Six	Maidens
0	0
0	0
1	0
2	0
1	0
0	0

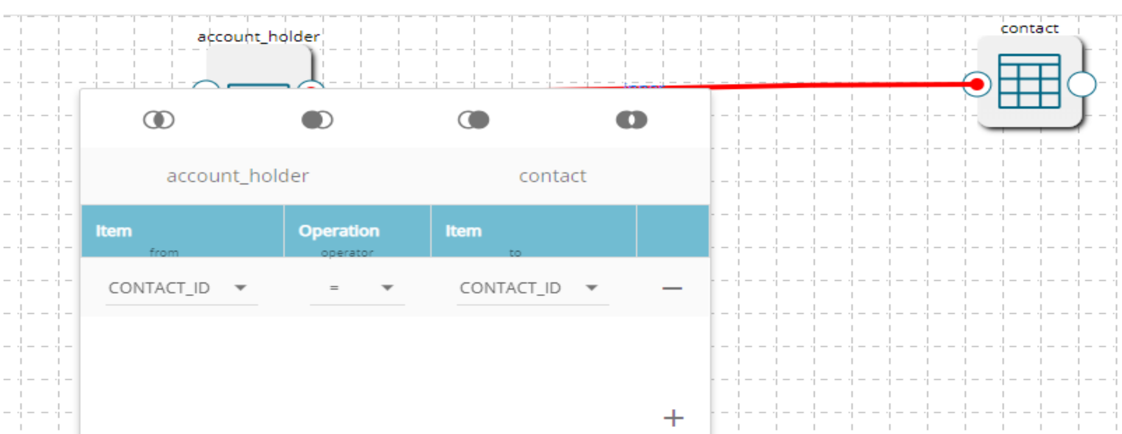
xiv) Select the '**Query**' tab to see the generated SQL query based on the selection of the data.



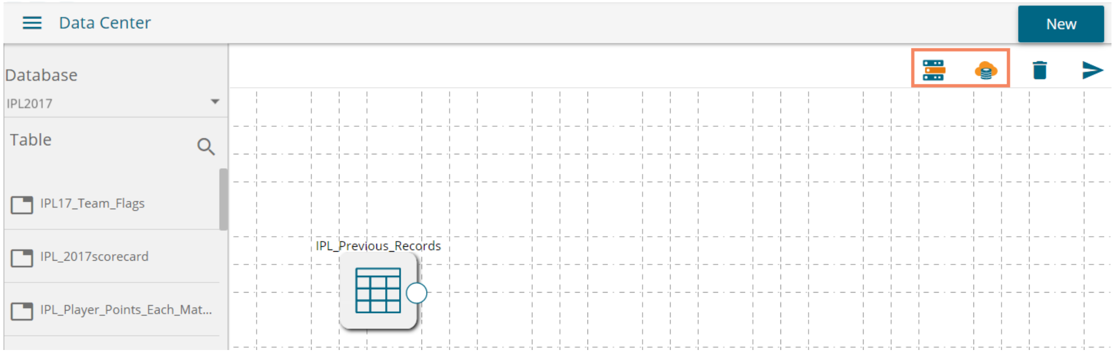

```
SELECT
 t0.No_Six,
 t0.Maidens
FROM
 IPL2017.IPL_Previous_Records t0
LIMIT
 1000
```

Note:

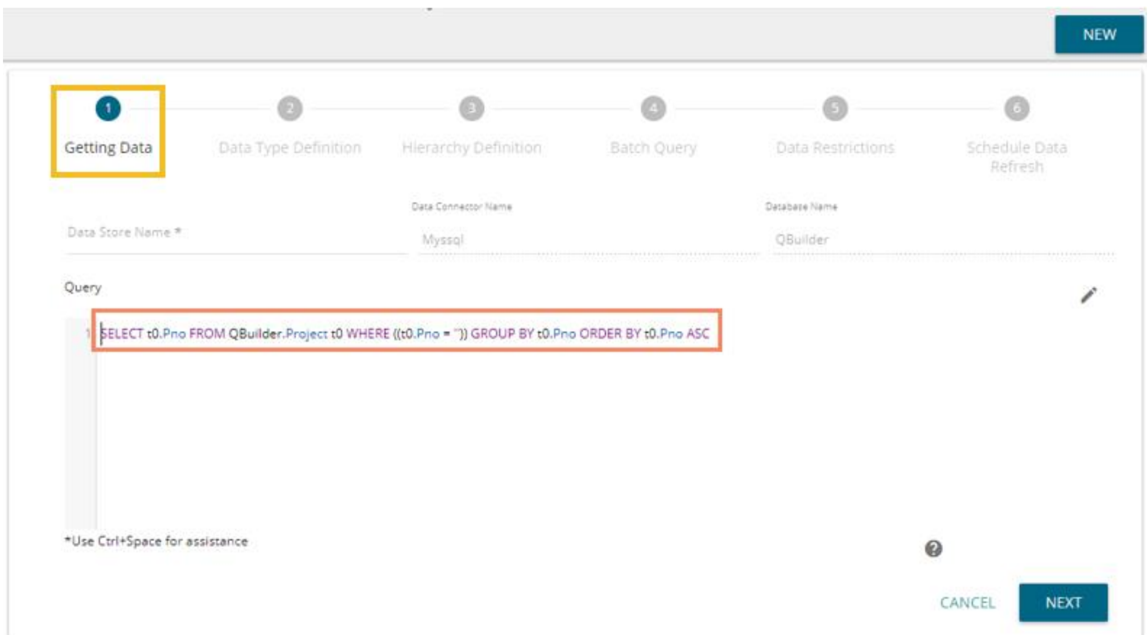
a. The Alias Name of the table and the '**Delete**' option appear for the selected table while clicking on it.
b. The user can join the multiple tables by joining the table-nodes. The users can see the possible join conditions in the pop-up window that displays on clicking the node-link.
E.g., Two different tables '**account_holder**' and '**contact**' are joined in the following image. By clicking on the connection link, the user gets the option to choose a join condition. Please note that auto-suggestion is provided to help the user with the join condition.



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



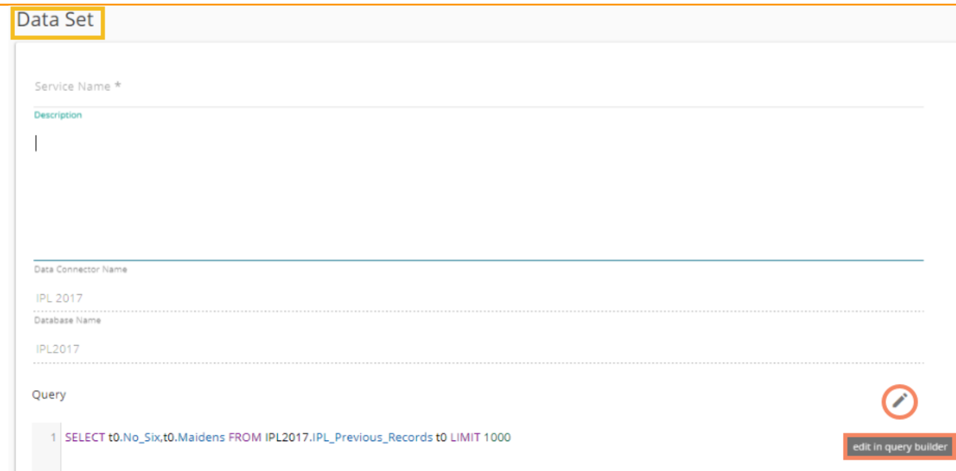
Based on the selection of either of the option (out of '**Create Data Set**' and '**Create Data Store**' option) The configuration forms open accordingly to create a new dataset or data store with the generated query pasted in the '**Query**' space. The user needs to follow the steps needed to complete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



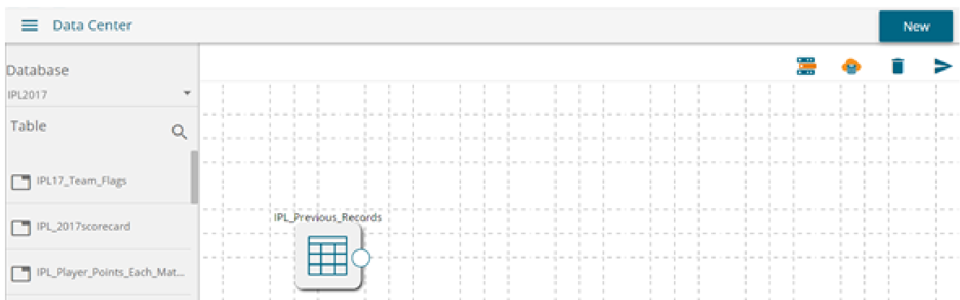
d. The user can use the Query Builder functionality to create basic queries and perform various joins, but it is not possible to create in-depth BI queries using the current Query Builder option.

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**' icon in the Data Store page.



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

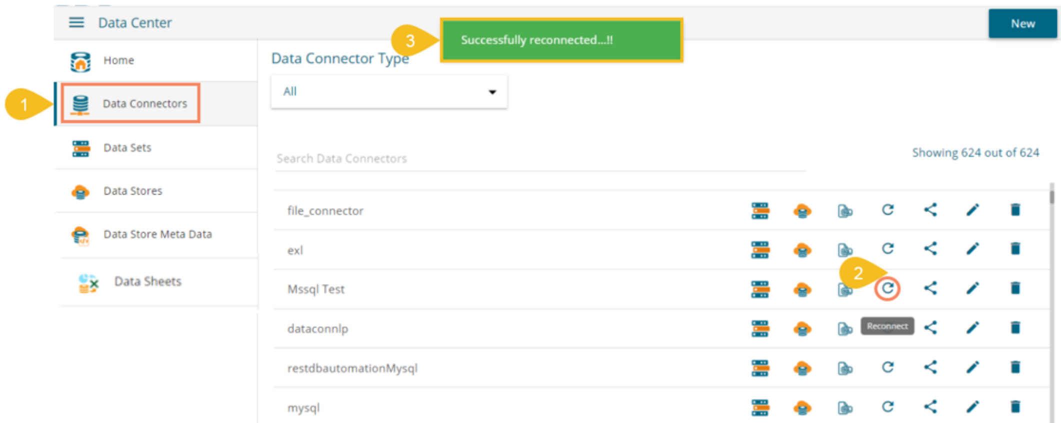


Note: If the user manually changes or modifies the query statement, then the query builder page gets disabled, and the ‘**Edit**’ option in the query builder disappears.

6.1.5. Reconnecting a Data Connector

i) Navigate to the Data Connector list.

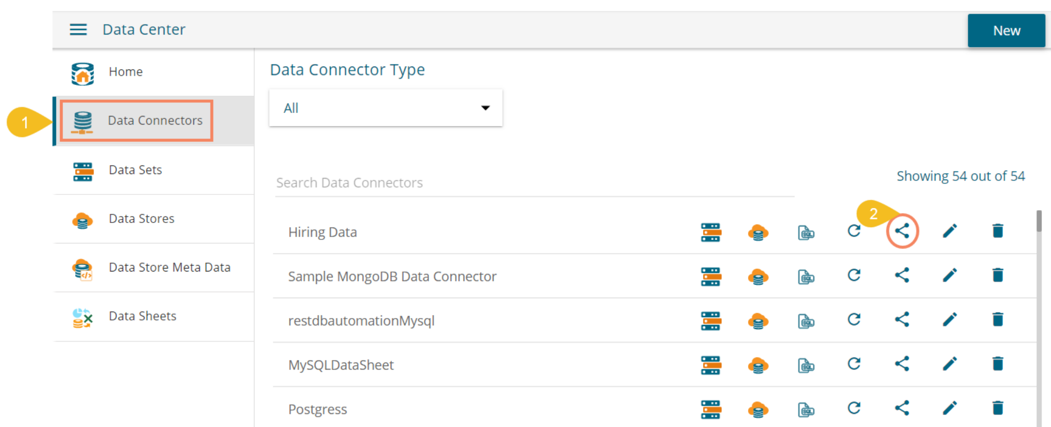
ii) Select a Data Connector and click the '**Reconnect**' icon provided in the connector list.
iii) A message appears to assure the action.



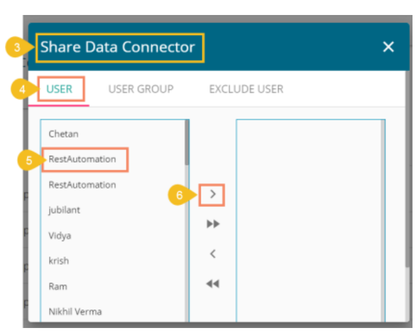
iv) The selected data connector gets reconnected.

6.1.6. Sharing a Data Connector

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

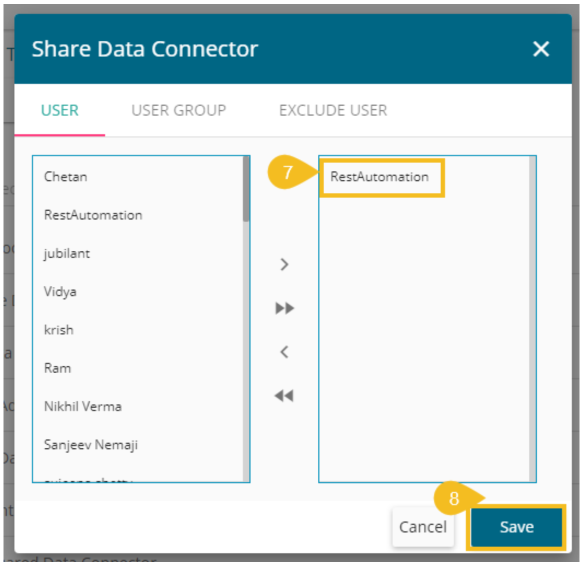


iii) The '**Share Data Connector**' window opens.
iv) Select an option out of the given choices: User and User Group or Exclude User ('Exclude User' option can be chosen, if the document is already shared with a user/user group and you wish to exclude them from the privilege).
v) Select a user or user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

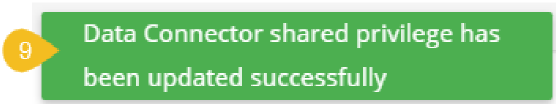


vii) The selected user(s)/user group(s) get moved to the box given on the right.

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



ix) Privilege for the selected Data Connector gets updated and the same gets communicated through a message.

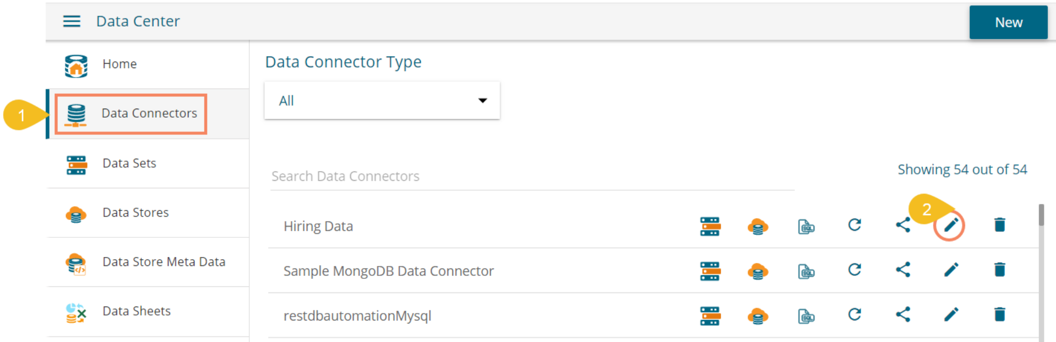


By completing the steps mentioned above, a data connector can be successfully shared with the selected user/user group or the selected users can also be excluded from their privileges for the concerned data connector.

6.1.7. Editing a Data Connector

i) Navigate to the list of Data Connectors.

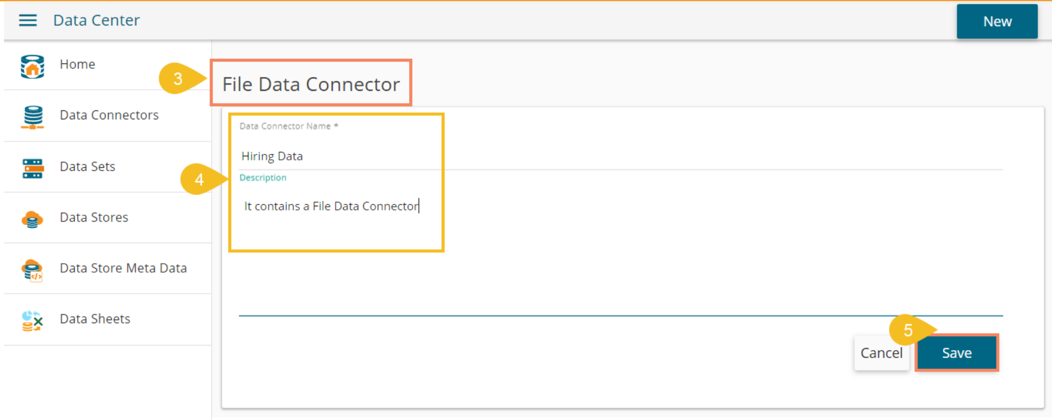
ii) Select a Data Connector and click the '**Edit**' icon.



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.

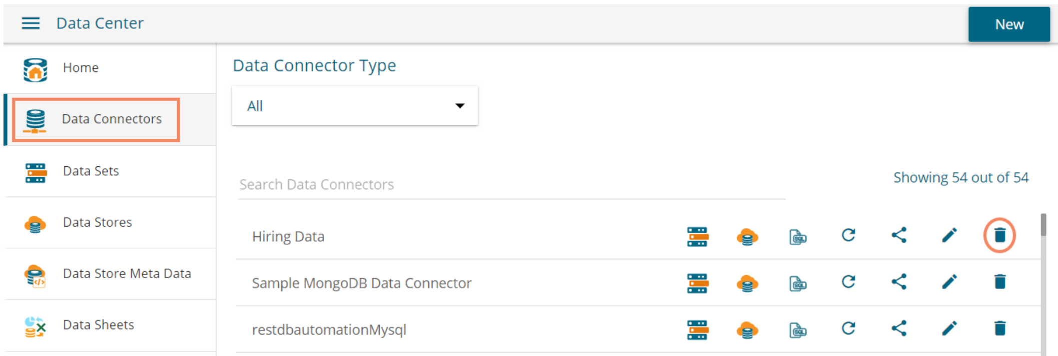


vi) A success message appears to inform the user that the data connector has been updated.

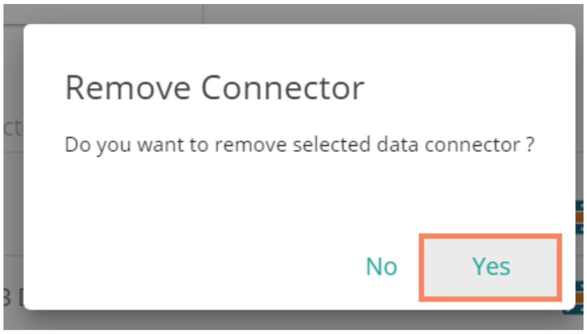
vii) The updated details get saved for the selected data connector.

6.1.8. Removing a Data Connector

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



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.

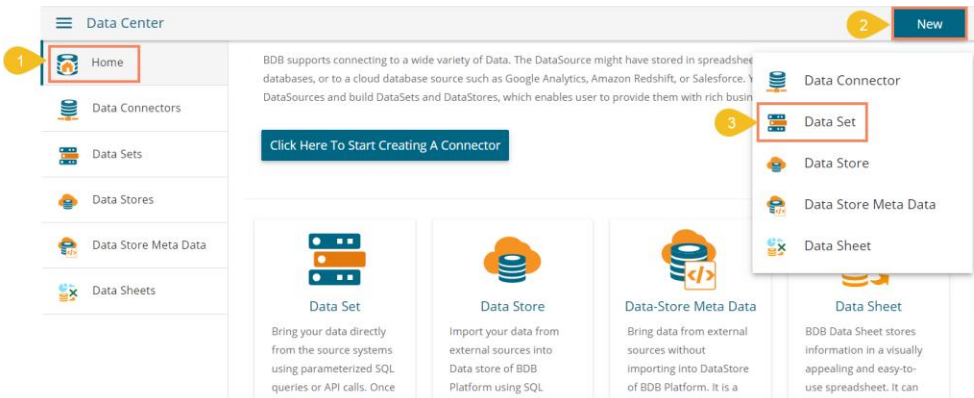
6.2.1. Creating a New Data Set using RDBMS or Big Data Connector

This section explains the steps to create a new Data Set.

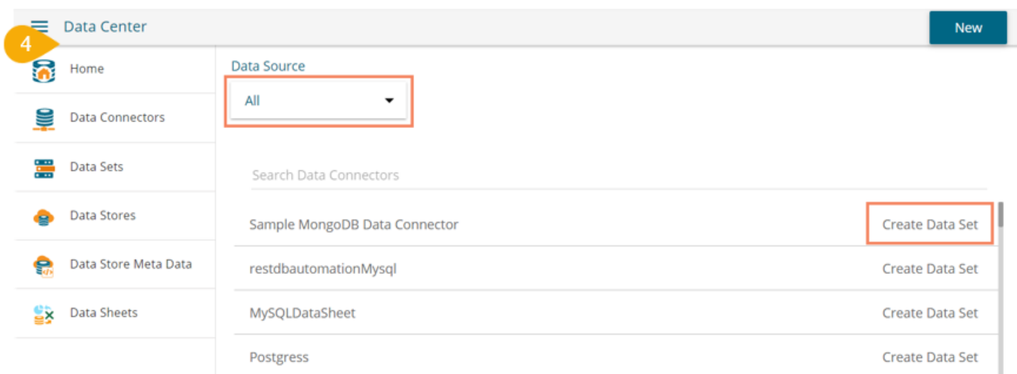
i) Navigate to the Data Center homepage.

ii) Click the ‘**New**’ option.

iii) Select the ‘**Data Set**’ option from the context menu.



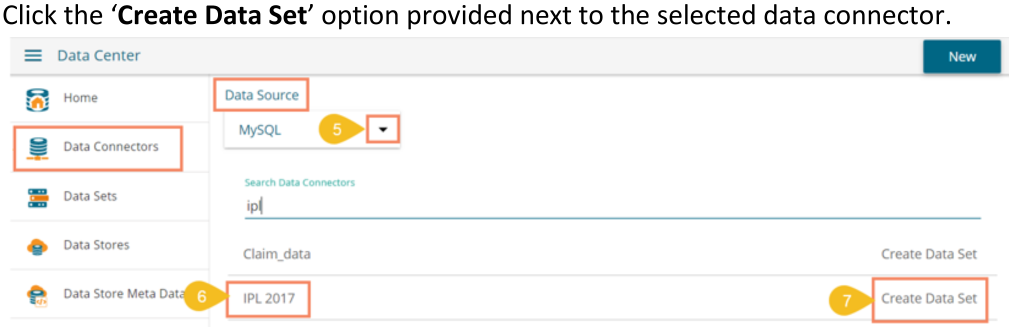
iv) The Data Connectors list gets displayed with the ‘**Create Data Set**’ option for all the available data connectors.



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.



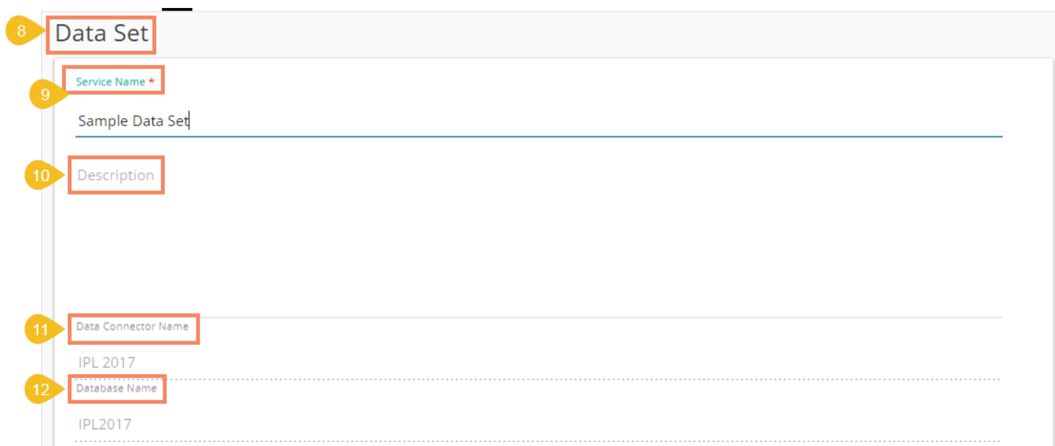
viii) The ‘**Data Set**’ page opens with the Configuration fields.

ix) **Service Name**: Enter any user-defined name for the new data set.

x) **Description**: Provide a brief description of the Data Set (optional).

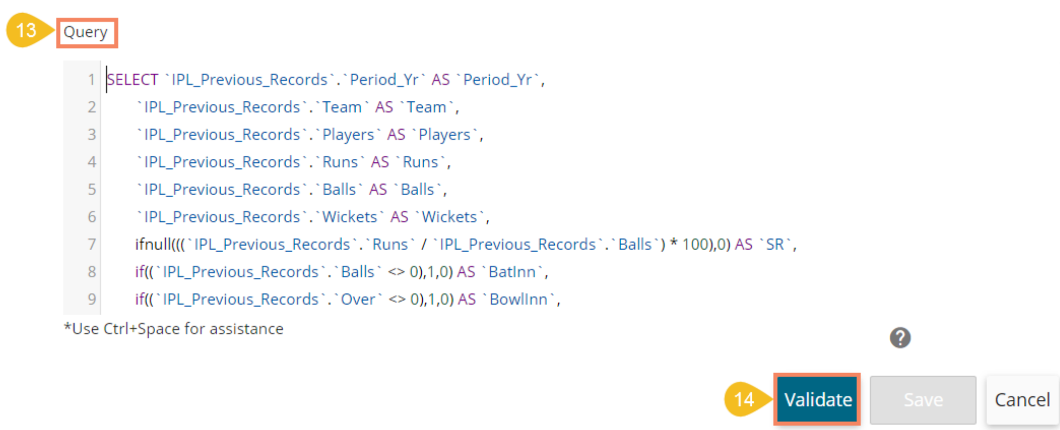
xi) **Data Connector Name**: This is a pre-defined field based on the selected data connector.

xii) **Database Name**: This is a pre-defined field based on the data connector chosen earlier.



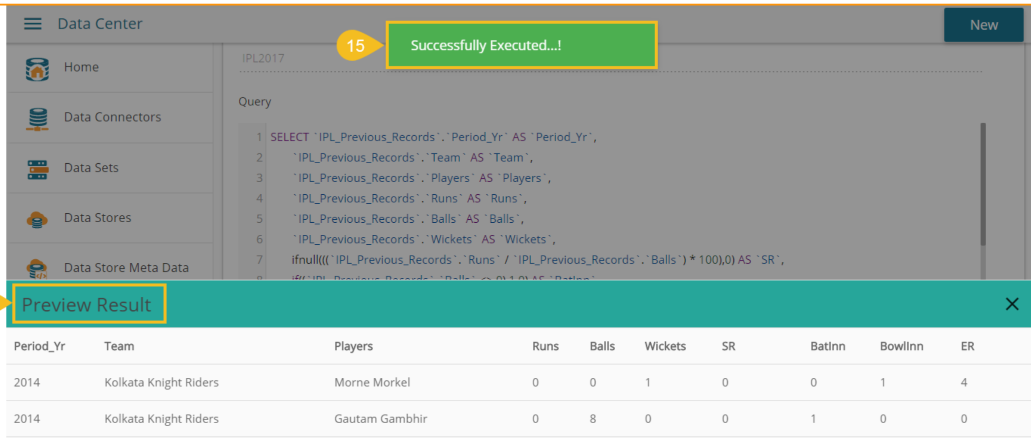
xiii) **Query**: Write a valid query service in the given space (Use ‘**Ctrl+Space**’ for assistance in writing a query).

xiv) Click the ‘**Validate**’ option to execute the new Data Set.

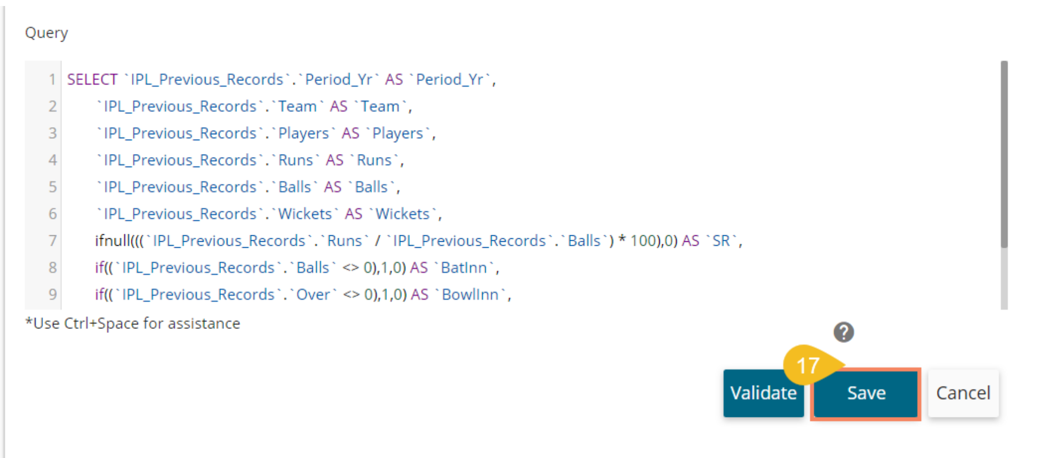


xv) A message appears to inform the successful execution.

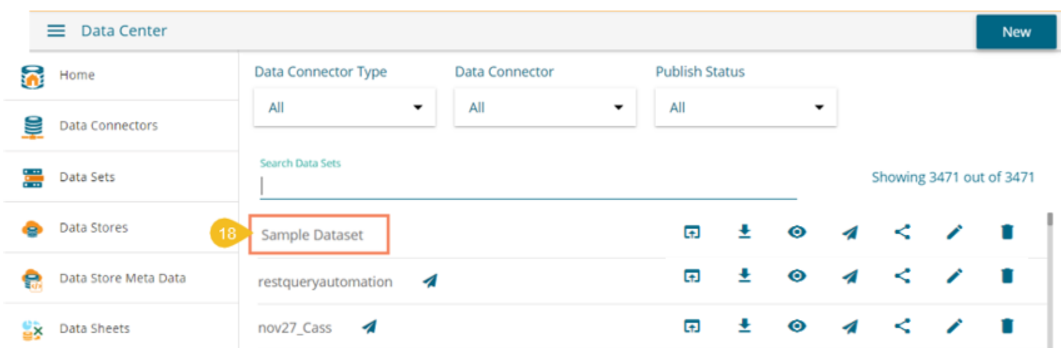
xvi) The data preview appears at the bottom of the page.



xvii) The ‘**Save**’ option gets enabled.



xviii) A newly created Data Set gets added to the ‘**Data Sets**’ List.



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

Option	Name	Task
	Publish As Data Service	To publish the Data Set as a data service
	Download	To download the Data Set
	View Link	To display the Data Set link
	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
	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.

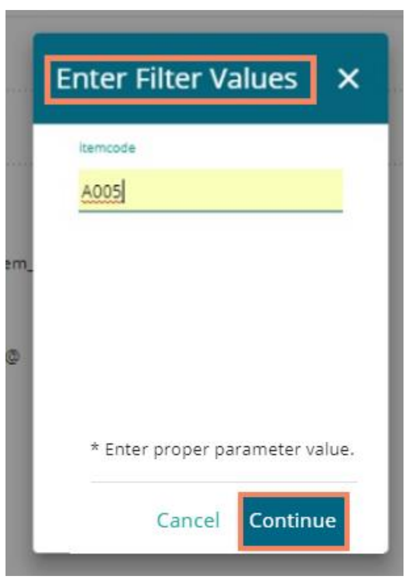
ii) Enter the filter condition to the '**Query**' section.

iii) Click the '**Validate**' option.

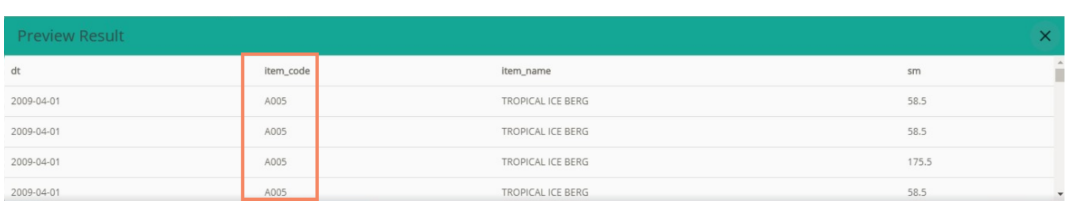
iv) A new window opens, asking for the filter value.

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.



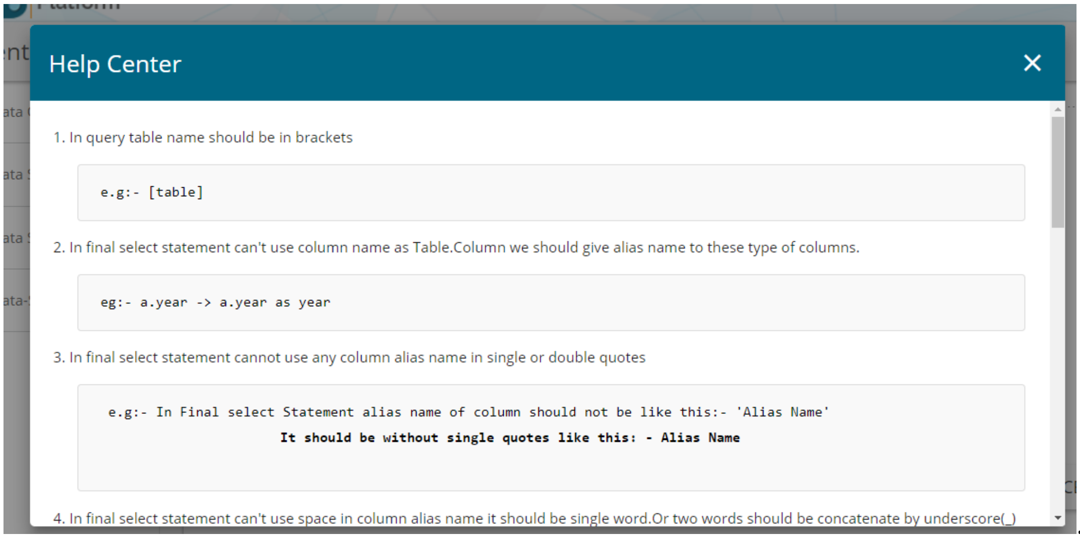
viii) Click the '**Save**' option to save the Data Set form.

ix) The newly created dataset gets saved with the filter value under the Data Sets list.

Note:

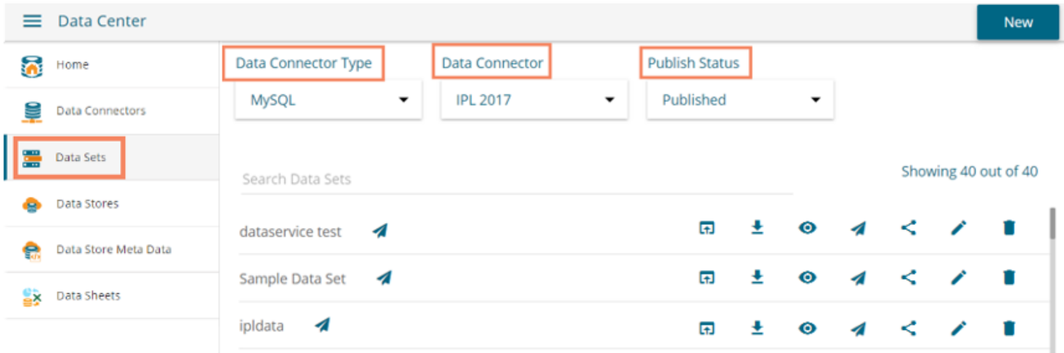
a. Use ‘**Ctrl+Space**’ to get assistance while writing a query.

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.



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.

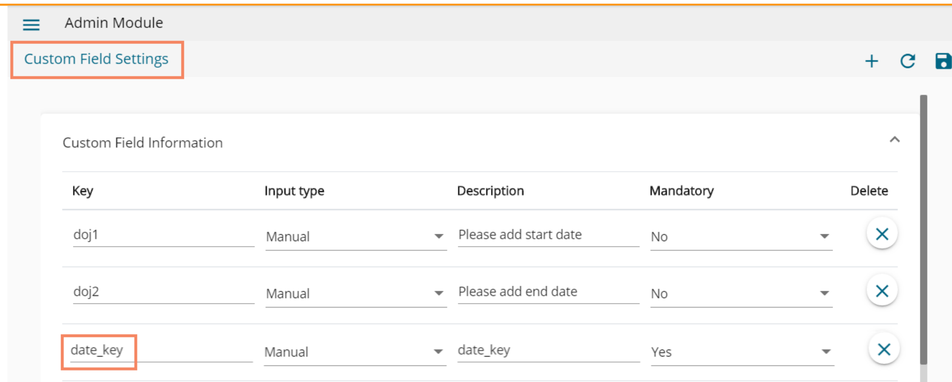


6.2.1.2. Restricting Displayed Data for End Users via Data Set

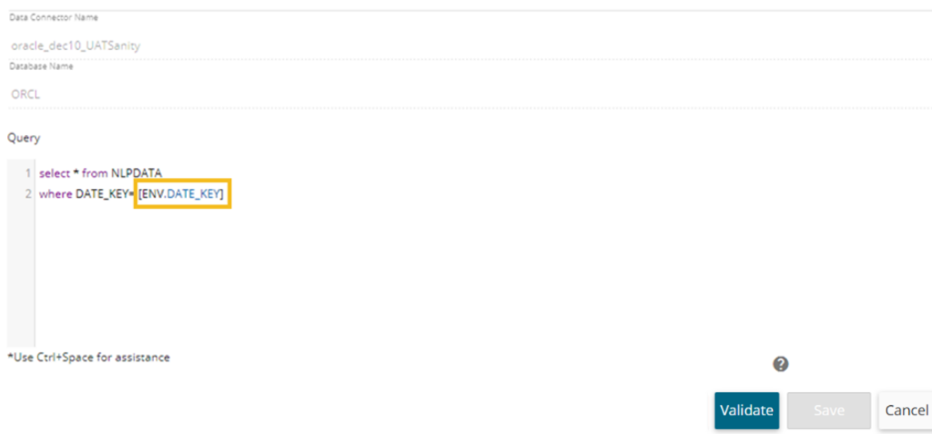
BDB Platform provides an option to control data display for the Dashboard end-users.

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.

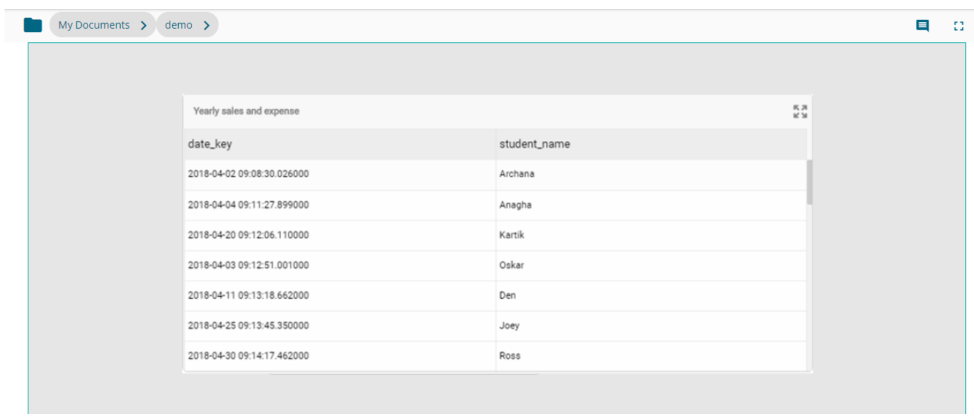
i) Create a Custom Field using the Configuration and settings admin section.



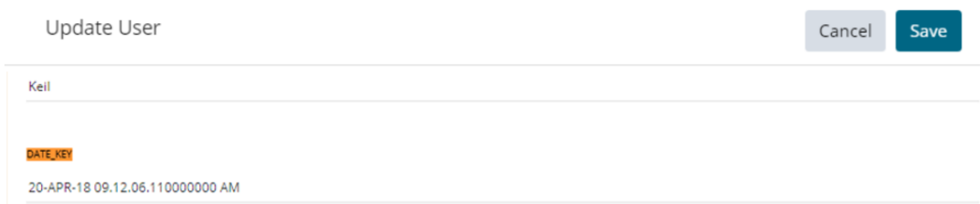
ii) Create a Data Set using the ENV with the selected Custom Field Key.



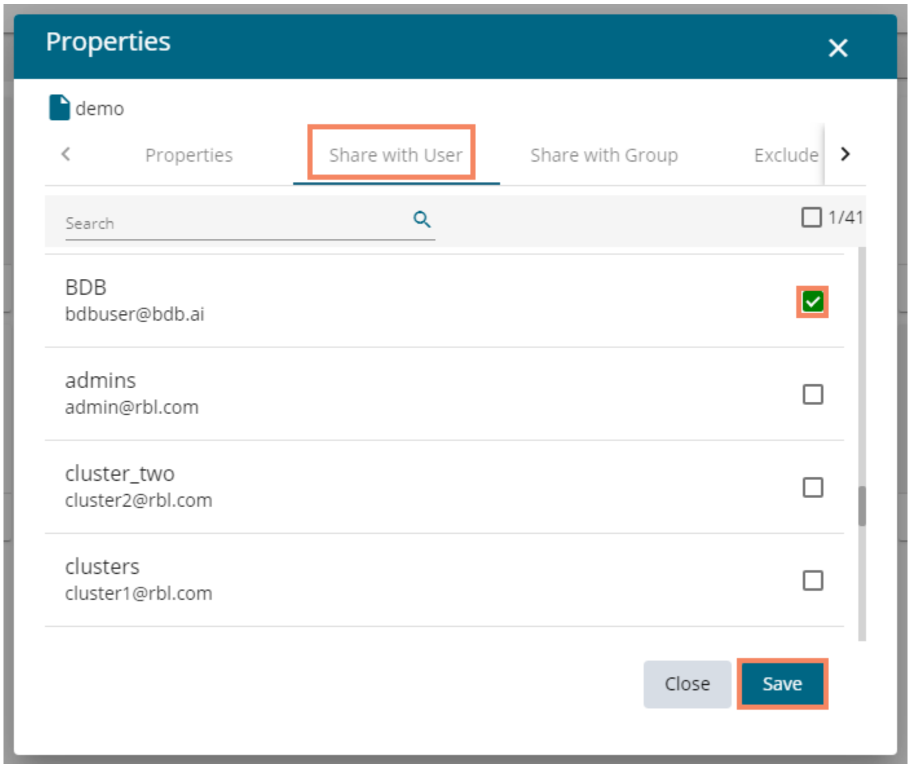
iii) Create a Dashboard using the Data Set.
iv) Publish the Dashboard to the portal.
v) Open the Dashboard (it opens in preview mode by default as displayed below).



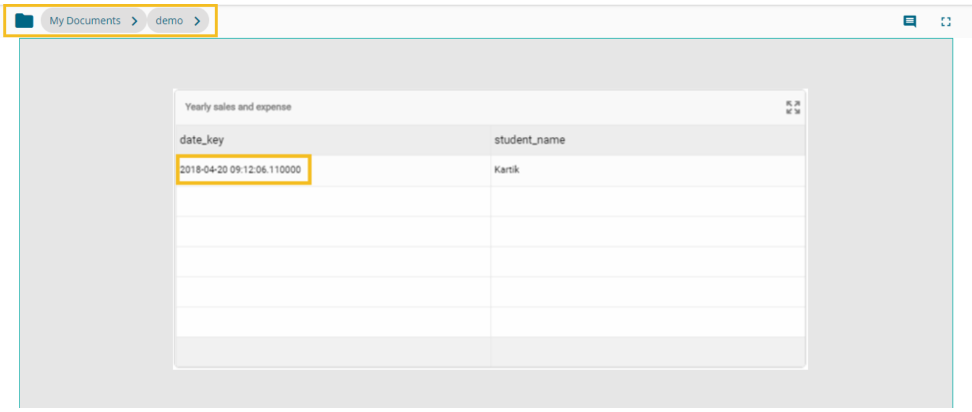
vi) Create a new user (using the '**User**' module) and pass the Custom Field value/ Update an existing user passing the Custom Field Value.



vii) Share it to another Platform user via the ‘**Share with User**’ option.



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

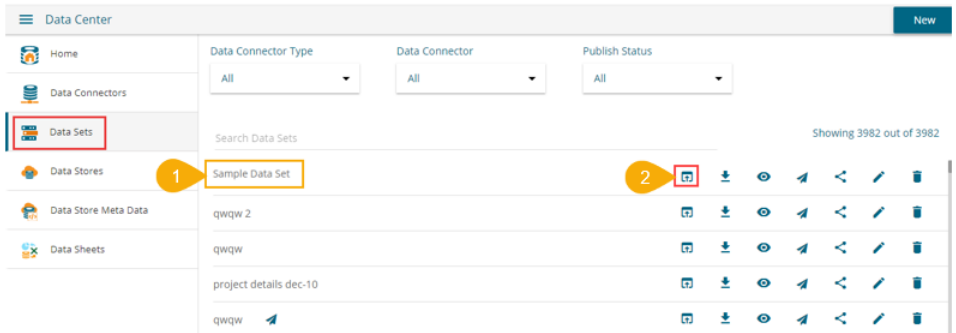


6.2.1.3. Publishing as Data Service

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.

i) Select a Data Set from the list of Data Sets.

ii) Click the '**Publish As Data Service'** icon.

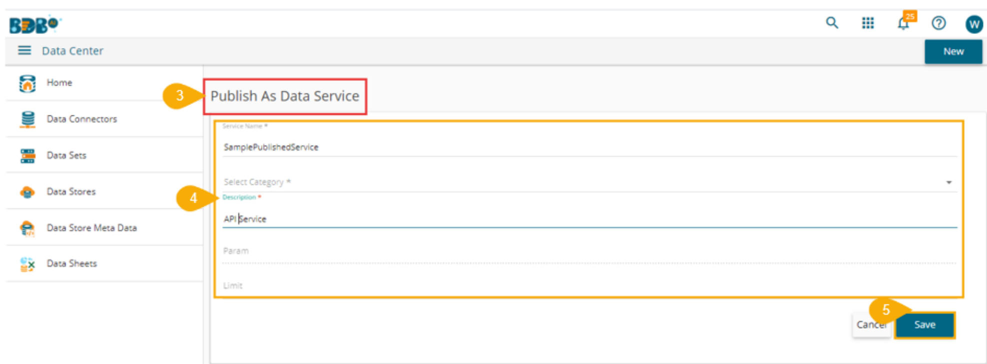


iii) The '**Publish As Data Service'** form opens.

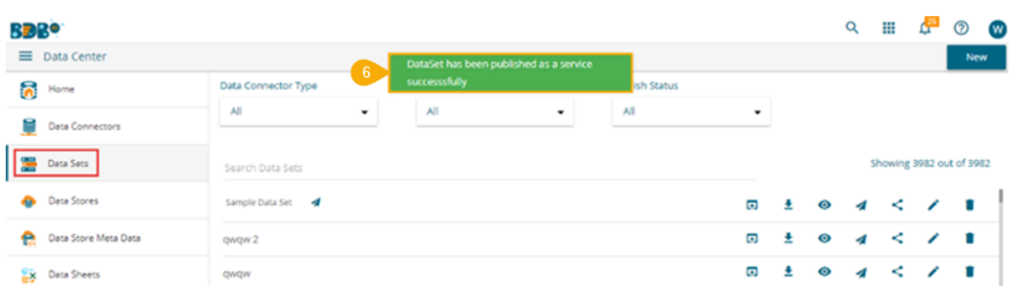
iv) Provide the following information:

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.

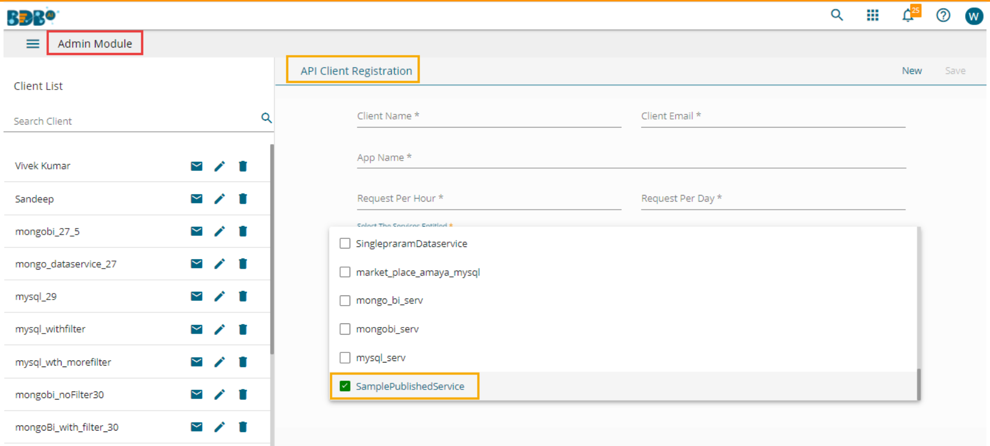


vi) A success message notifies the users that the selected data set has been published as a service.



Note:

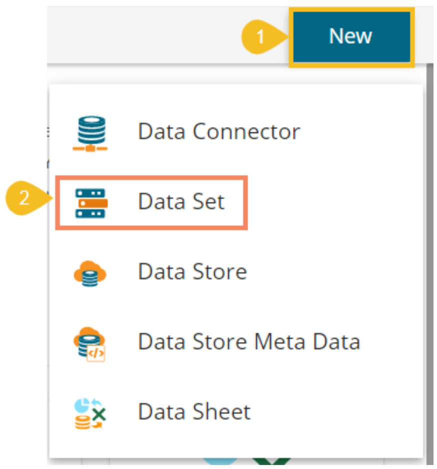
a. The user can add filter(s) to the data set as a service.
b. The published data set as service appears on the API Client registration page.
c. The Data Set published as a data service appears under the drop-down menu of the API Client Registration form.



6.2.2. Creating a New Data Set Using API Connectors

i) Click the '**New**' menu from the Data Center page.

ii) Select the '**Data Set**' option from the context menu.

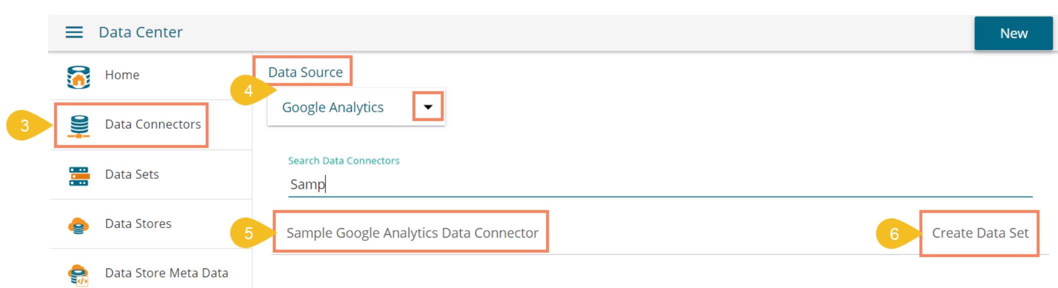


iii) The page containing all the data connectors opens.

iv) Use the '**Data Source**' filter to search for a specific API Data Connector (E.g., the below image displays '**Google Analytics**' as the data source filter).

v) Select a data connector from the displayed list (E.g., in this case, a google analytics data connector is selected).

vi) Click the '**Create Data Set**' option.



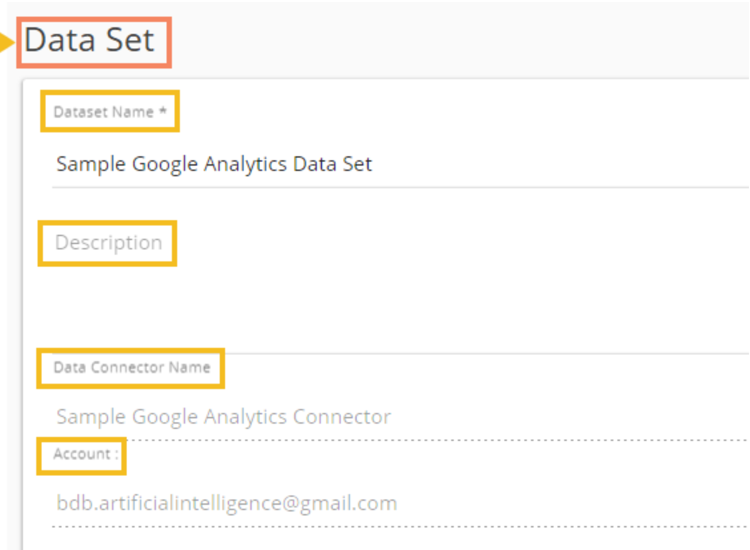
vii) The user gets redirected to a new Data Set form for Google Analytics Data Set.

viii) Fill in the following information:

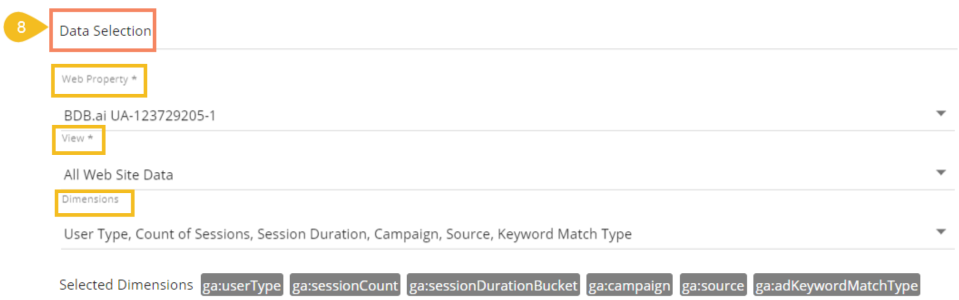
a. Dataset Name: Enter any user-defined name for the new dataset.

b. Description: Provide a brief description of the Data Set (It is an optional field).

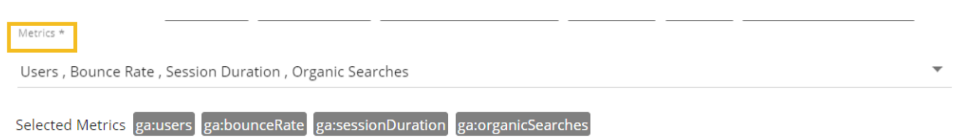
c. Data Connector Name: This option comes pre-defined as per the selected data connector.
d. Account: This option comes pre-defined based on the selected google account.



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).



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

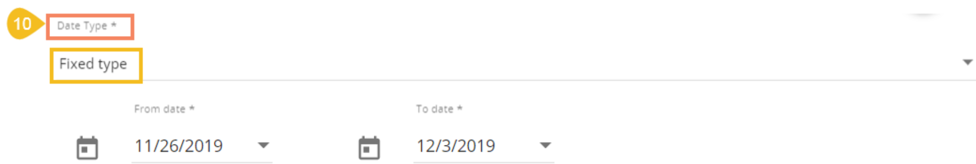


Note: **Select Web Property**, **Select View**, and **Metrics** are the mandatory fields to create a Google Data Set.

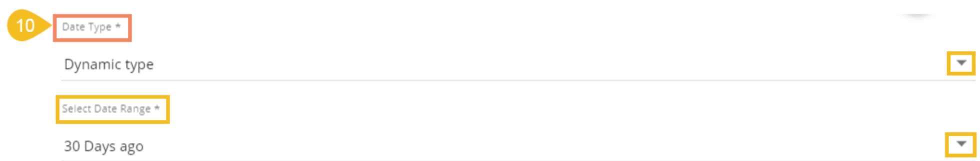
f. **Apply Filter**: Enable the filter option. The filter query displays below.

g. **Date Type**: Select a Date Type using the given options- ‘**Fixed Type**’ and ‘**Dynamic Type.**’

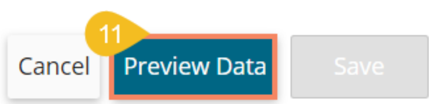
   i. **Fixed Type**: Define a time range by specifying dates using the ‘**From date’** and ‘**To date**’ options.



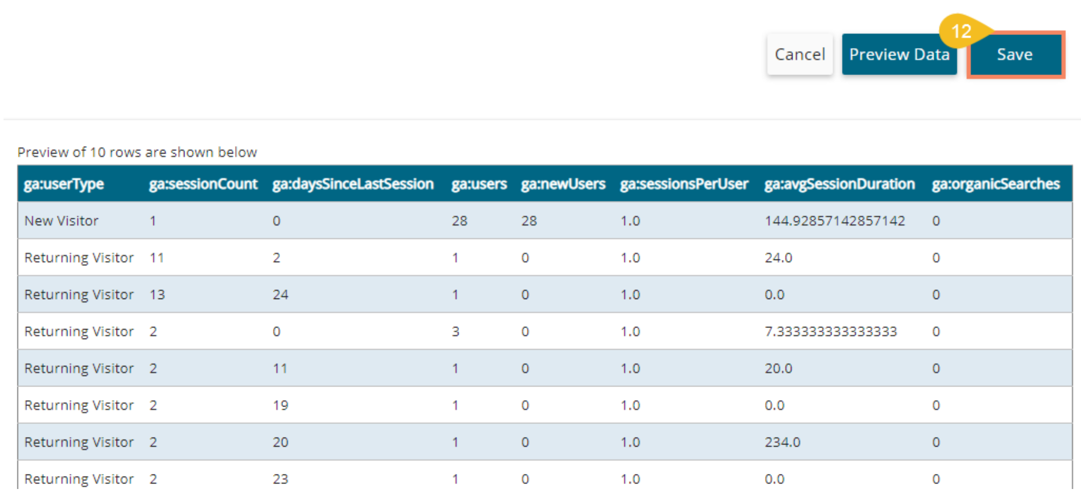
   ii. **Dynamic Type**: Select an option from the drop-down menu to define the time range.



h. Click the ‘**Preview Data’** option.

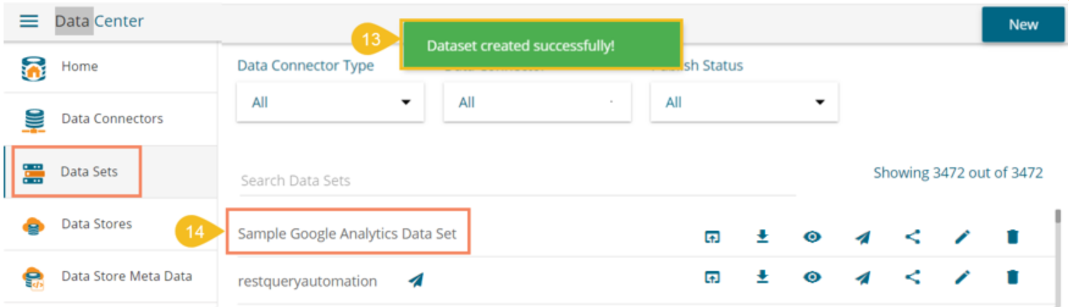


ix) After getting the data preview in the tabular format, click the ‘**Save**’ option.



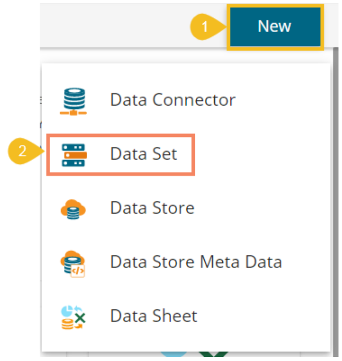
ga:userType	ga:sessionCount	ga:daysSinceLastSession	ga:users	ga:newUsers	ga:sessionsPerUser	ga:avgSessionDuration	ga:organicSearches
New Visitor	1	0	28	28	1.0	144.92857142857142	0
Returning Visitor	11	2	1	0	1.0	24.0	0
Returning Visitor	13	24	1	0	1.0	0.0	0
Returning Visitor	2	0	3	0	1.0	7.333333333333333	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.

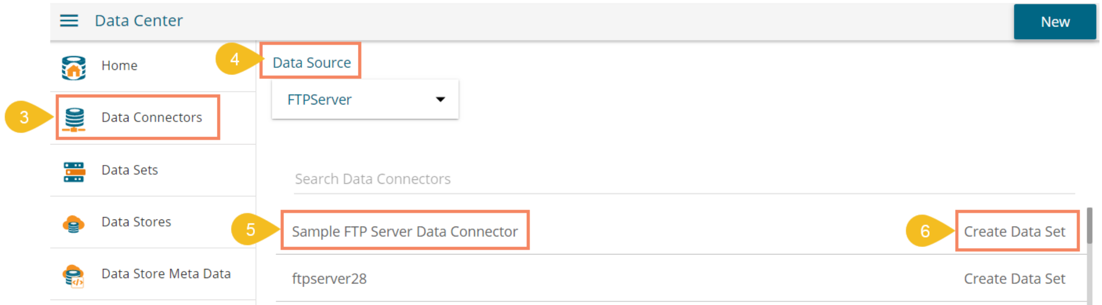


6.2.3. Creating a New FTP Data Set

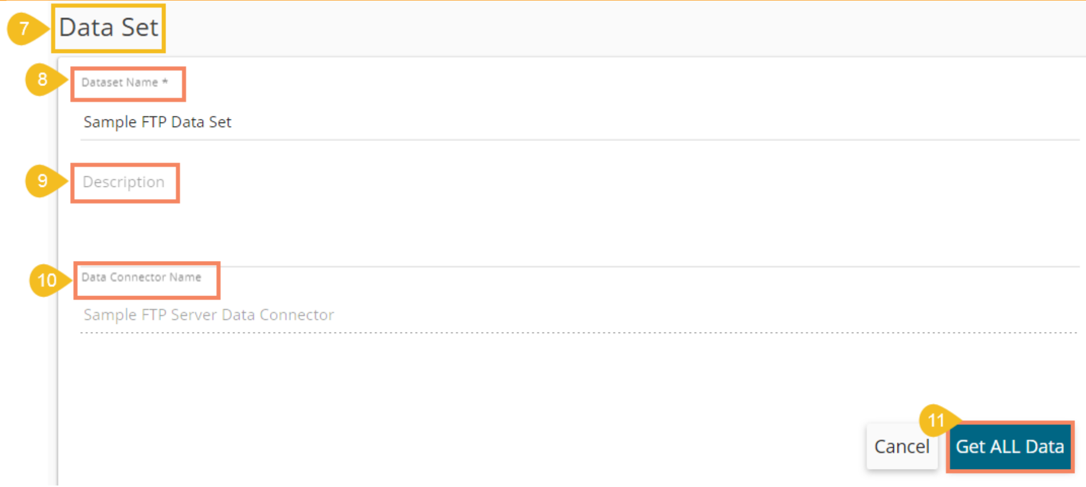
i) Click the '**New**' menu from the Data Center page.
ii) Select the '**Data Set**' from the context menu.



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.

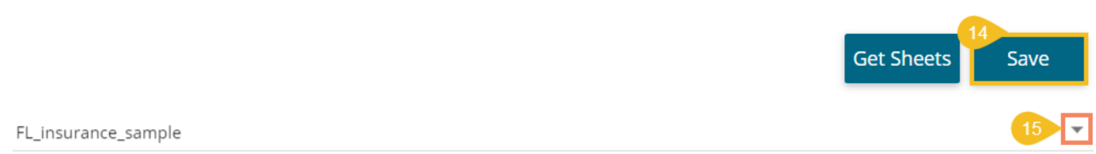


vii) A new Data Set creation form opens for the FTP Data Set.
viii) Provide a name for the Data Set.
ix) Describe the Data Set (Optional).
x) The pre-selected Data Connector name appears.
xi) Click the '**Get All Data**' option.

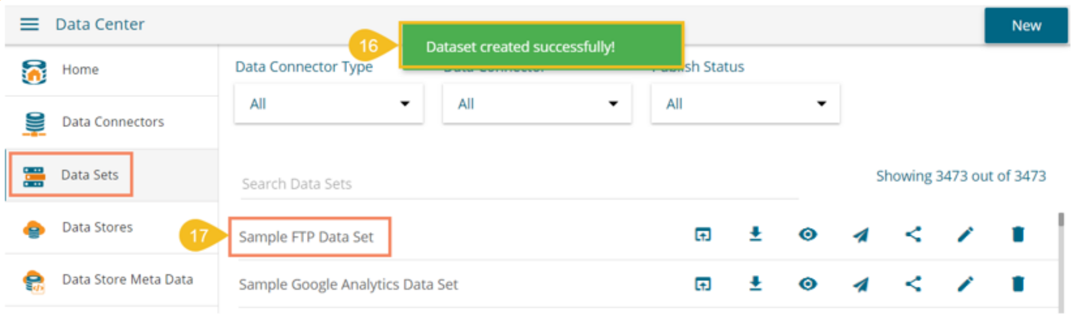


xii) Select a file from the displayed list (Use double-click on a file to select it.)
xiii) After selecting a specific file, click the '**Get Sheets**' option.

xiv) Choose a sheet using the drop-down menu.
xv) Click the '**Save**' option after getting the data preview.



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

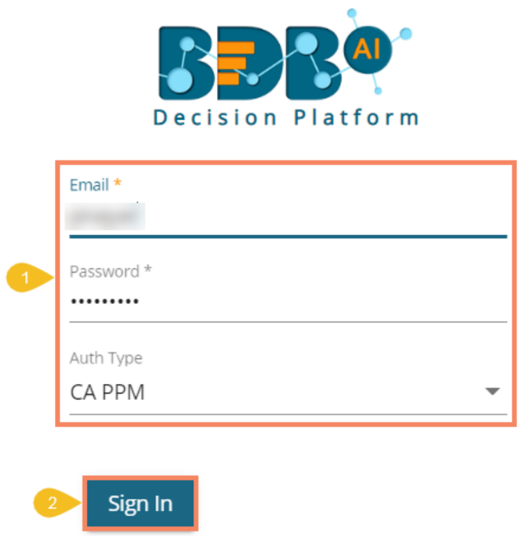


6.2.4. Creating a CA PPM Data Set

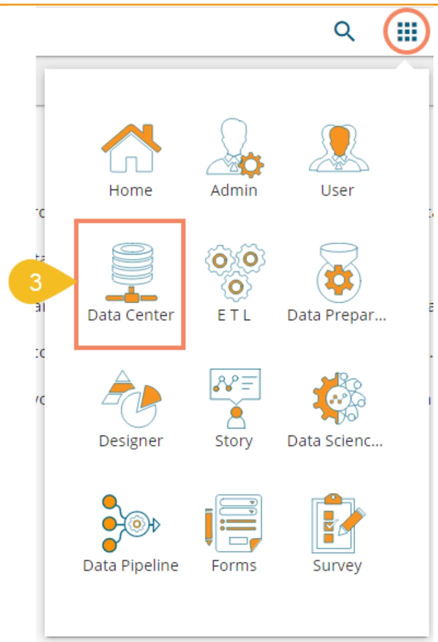
The CA Connector is accessible only for the CA PPM users.

i) Provide your valid credentials for Login, select the 'CA PPM' as the Auth Type.

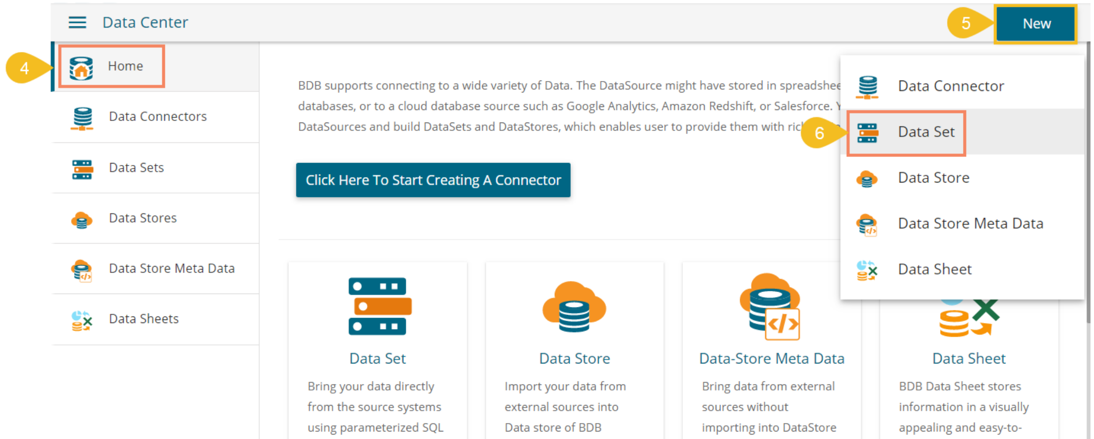
ii) Click the '**Sign In**' option.



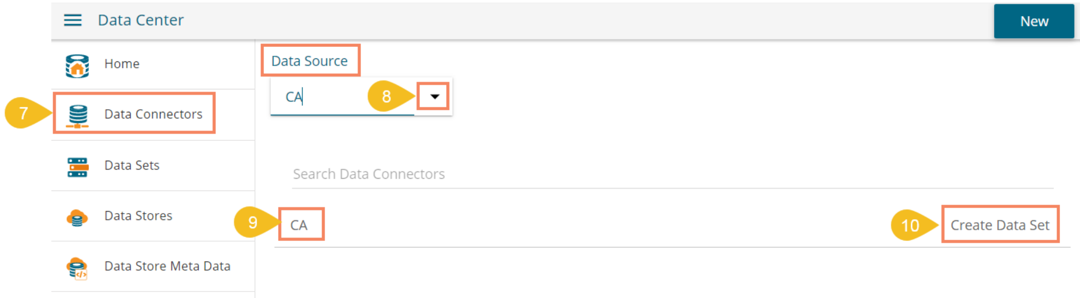
iii) Select the '**Data Center'** module from the Apps menu.



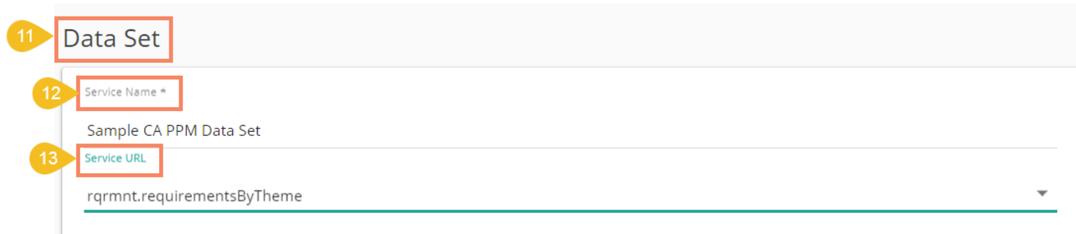
iv) The Data Center homepage opens.
v) Click the '**New**' option.
vi) Select the '**Data Set**' option from the context menu.



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.

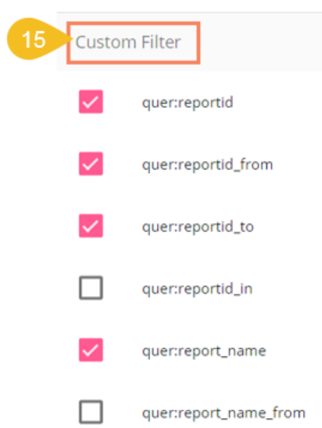


xi) A form opens to create a new Data Set.
xii) Provide a Service Name defined by the user to identify the data set.
xiii) Select a Service URL from the drop-down list.

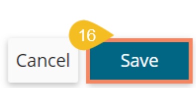


xiv) Mandatory Filter: A list of the selected mandatory filter based on the service URL displays.

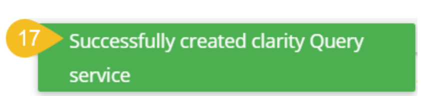
xv) Custom Filter: Select the '**Custom Filter**' options using the checkmarks in the boxes.



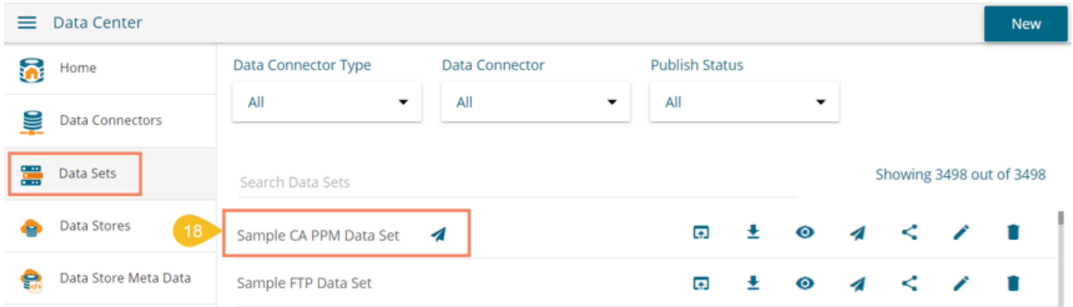
xvi) Click the '**Save**' option.



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

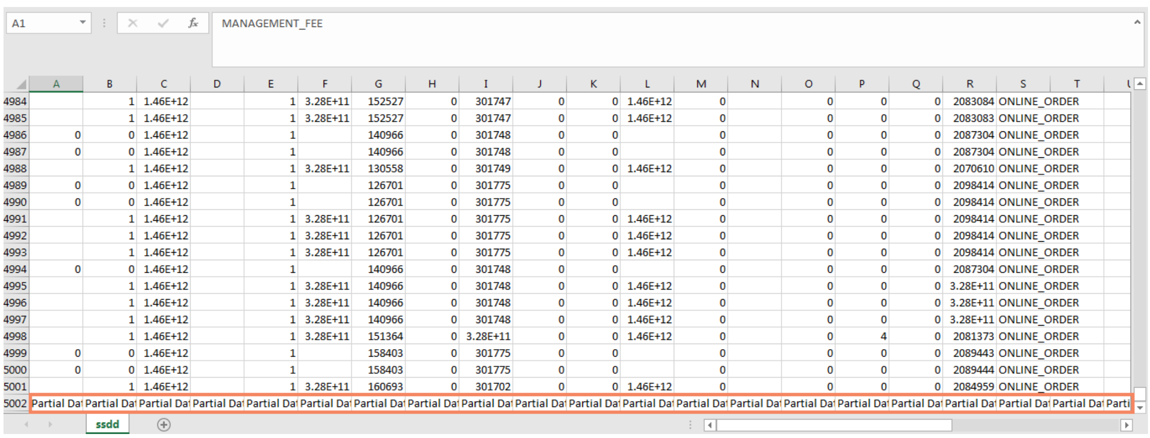


xviii)The newly created Data Set gets added to the Data Sets list.



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.



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.

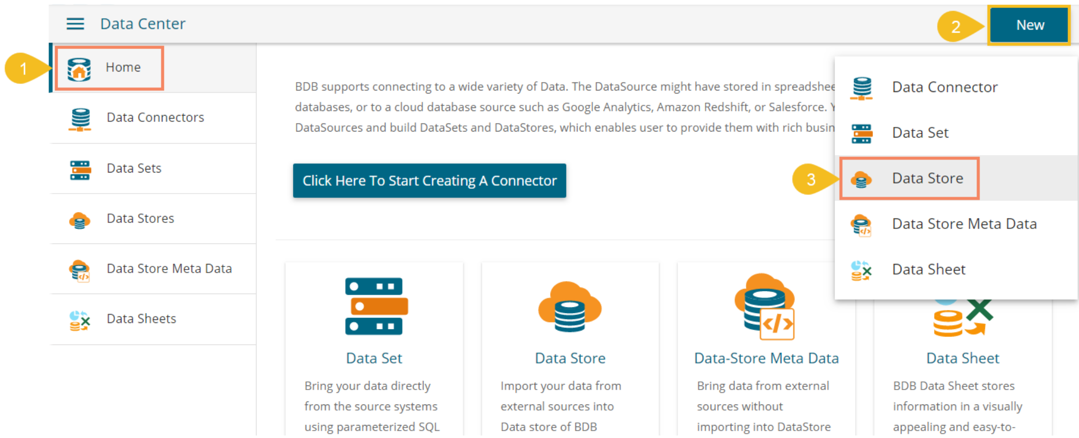
This section describes steps to store data in a specific format that can be used to create interactive visual reports.

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.

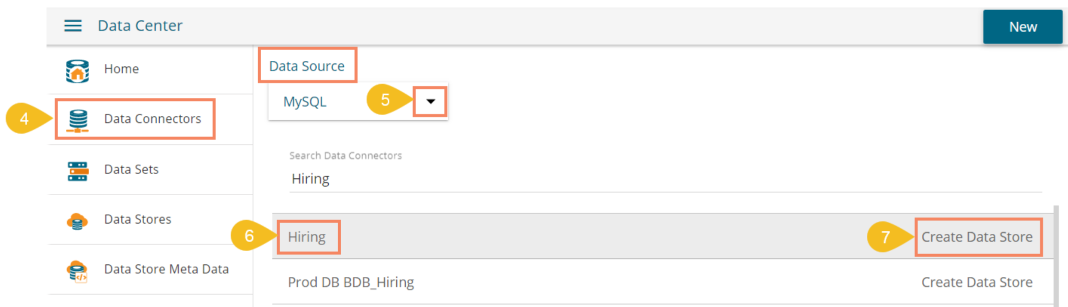
iv) The Data Connectors list opens.



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.



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

6.3.1.1. Getting Data

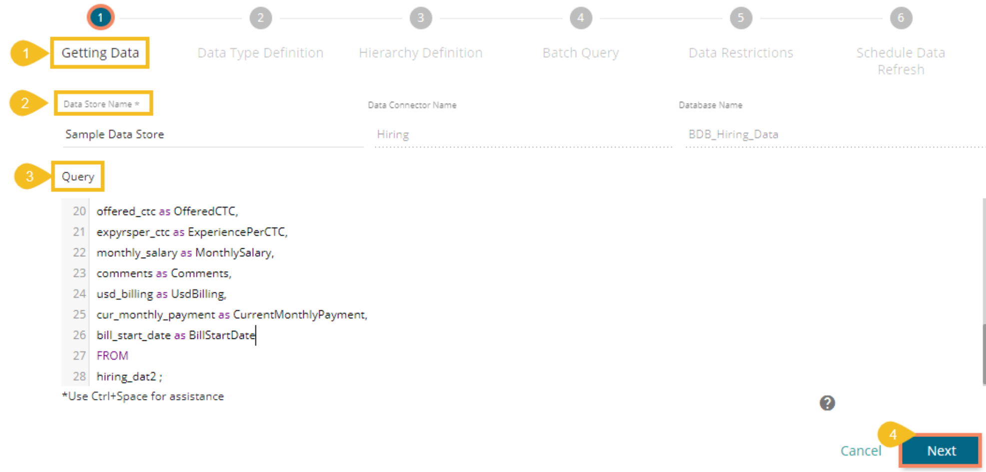
This section displays a form to create a new data store. Users need to provide the following information:

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).

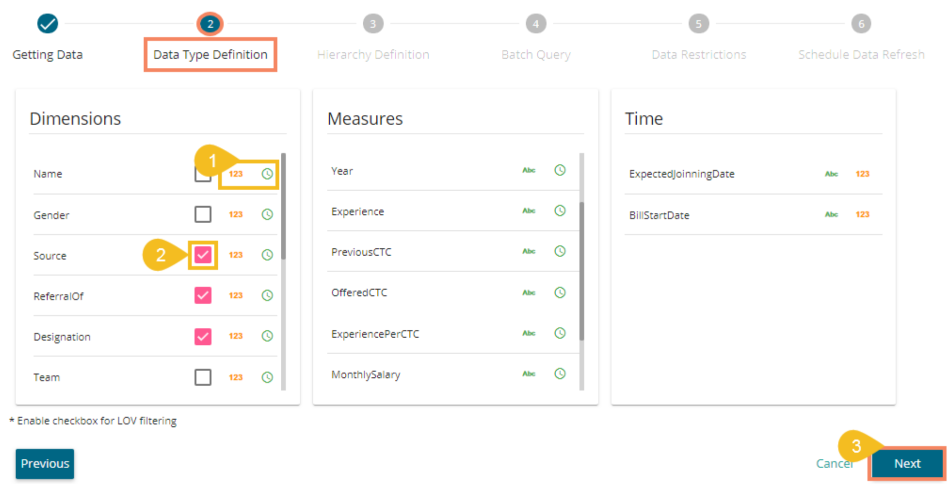
iv) Click the '**Next**' option to proceed.



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.



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
	Move to Time

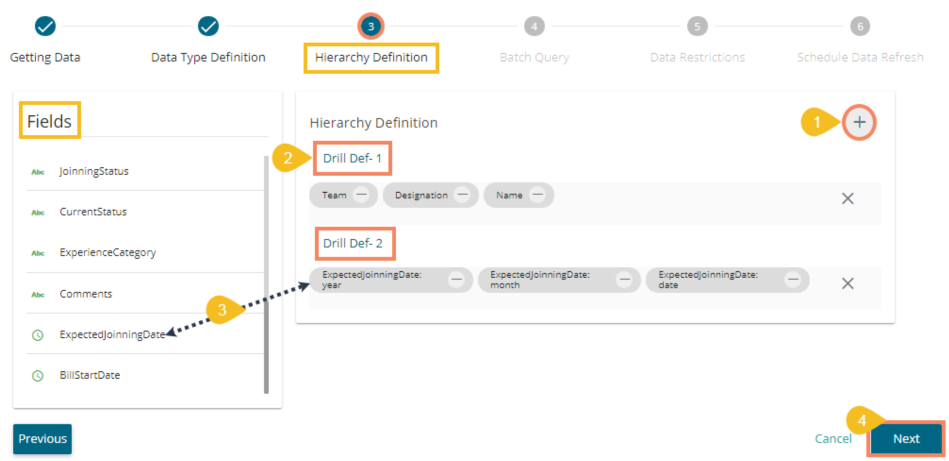
b. Click the '**Previous**' option to go back to the previous tab.

c. The user can get a List of Values (LOV) in the filter panel of the BDB Self-service BI for by enabling the Dimensions from the datastore.

6.3.1.3. Hierarchy Definition

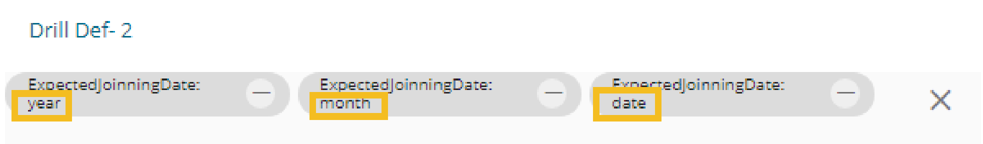
Define hierarchy using various dimensions and time options.

i) Click the '**Add**' + option provided on the Hierarchy Definition page.
ii) A new '**Drill Def**' box gets added.
iii) Drag and drop the dimensions or time options to define a hierarchy.
iv) Click the '**Next**' tab to proceed.



Note:

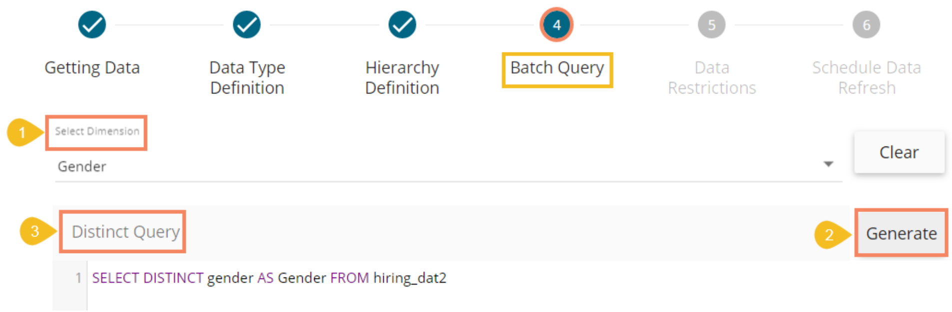
a. Click the '**Previous**' option to go back to the previous tab.
b. Click the '**Remove**' option — (in the Drill Def box) to remove the defined hierarchy using the selected option.
c. The '**Date Drill**' functionality is available for the Time dimensions. By default, the Time dimensions can be split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



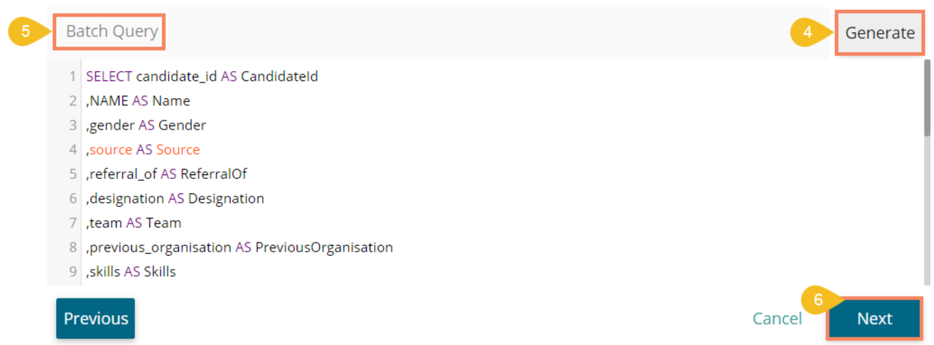
d. Each dimension value needs to be dragged and dropped multiple times to create a hierarchy among the dragged values.

6.3.1.4. Batch Query

Split the data fetching process into different batches by generating a batch query.
i) Select a Dimension using the drop-down menu.
ii) Click the '**Generate**' option.
iii) Based on the selected dimension, a distinct query is generated (in the below-given box). The user can edit the distinct query as per their requirement.



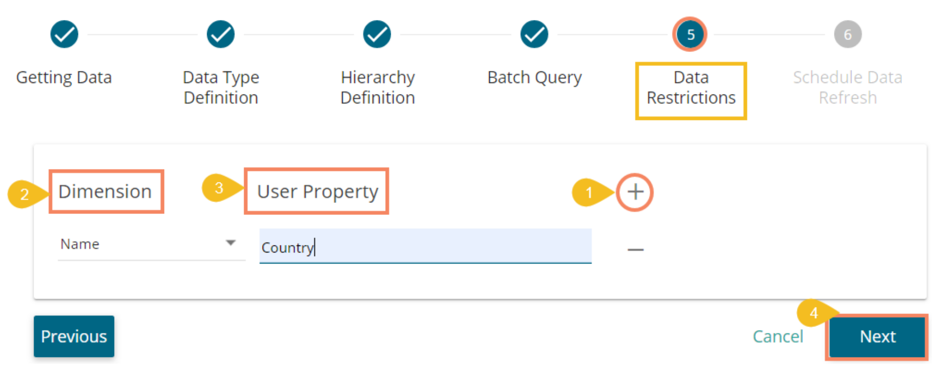
iv) Click the ‘**Generate**’ option provided for the ‘**Batch Query**’ option.
v) The original query generates with the distinct query specifications to fetch data.
vi) Proceed to the next tab by clicking the ‘**Next**’ tab.



6.3.1.5. Data Restriction

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

i) Click 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.

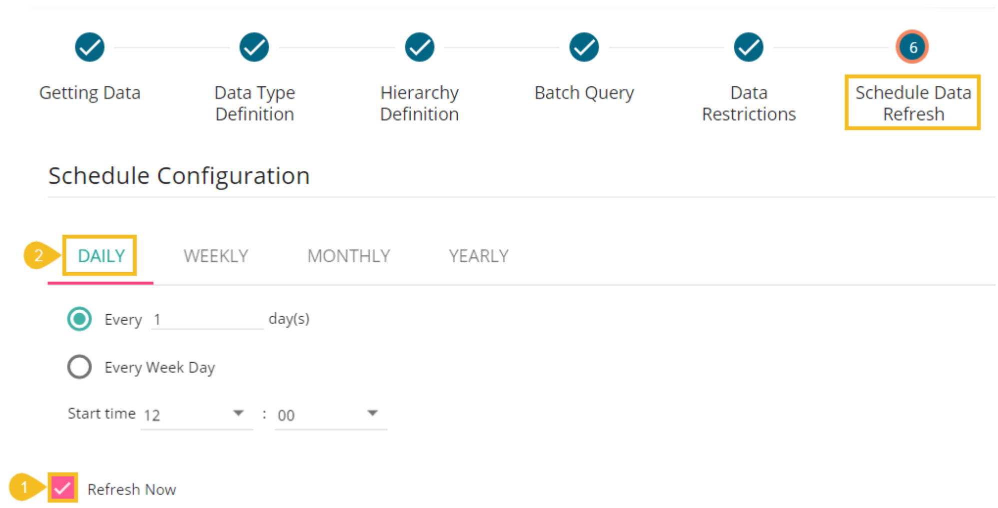


Note: The Administrator can restrict access to data for a specific user by configuring the User Property via the ‘**Data Restriction**’ tab. **E.g.,** If for a user/user group ‘**Country**’ custom field is provided value ‘**India,**’ and the administrator passes ‘**Country**’ as User Property while creating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

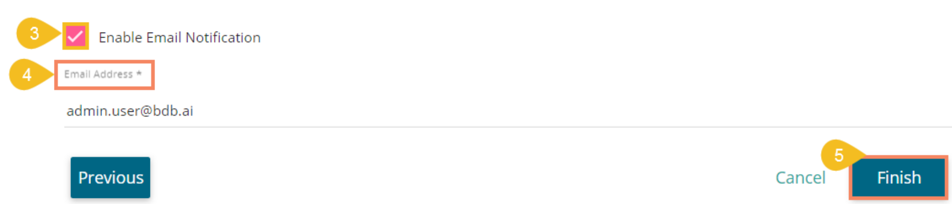
6.3.1.6. Schedule Data Refresh

The user can schedule a data refresh interval via the 'Schedule Data Refresh' tab.

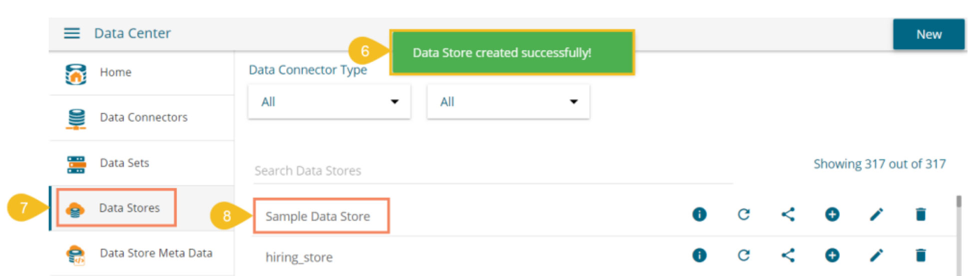
i) Enable the Refresh Now option by using a checkmark in the given box.
ii) Define a time range to refresh data using the following options:
   a. Daily
   b. Weekly
   c. Monthly
   d. Yearly
   (Select any one option from the above-given list to set the data refresh interval)



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.



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.



Option	Name	Task
ⓘ	Latest Scheduler Status	Displays the latest scheduler status via a pop-up window

	Refresh Data	Refreshes data for a datastore
	Share Data Store	Shares a datastore to/for the selected user(s) or group(s)
	Add Synonyms to Data Store	Adds more synonyms to a datastore
	Edit	Edit the datastore fields
	Remove	Remove a Data Store from the list

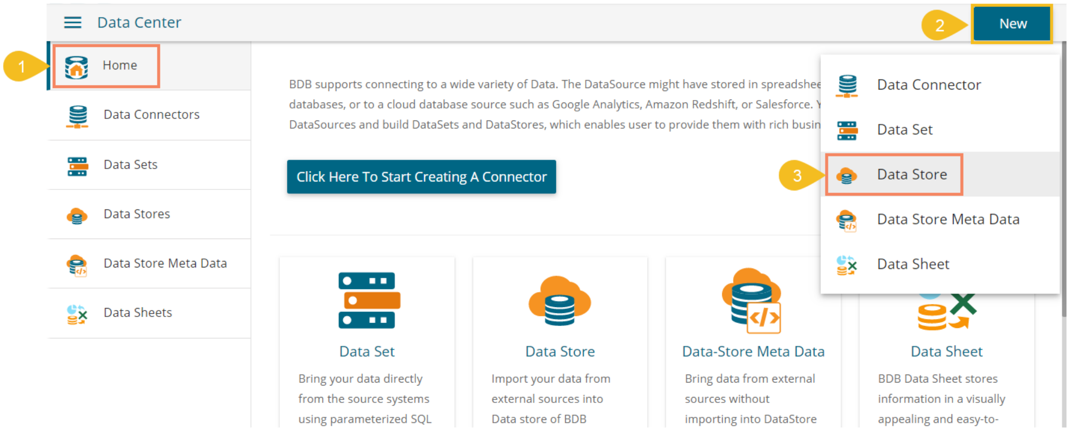
6.3.2. Creating a New Data Store Using a Flat File Data Connector

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

i) Navigate to the Data Center homepage.

ii) Click the '**New**' option.

iii) Select the '**Data Store**' option from the context menu.

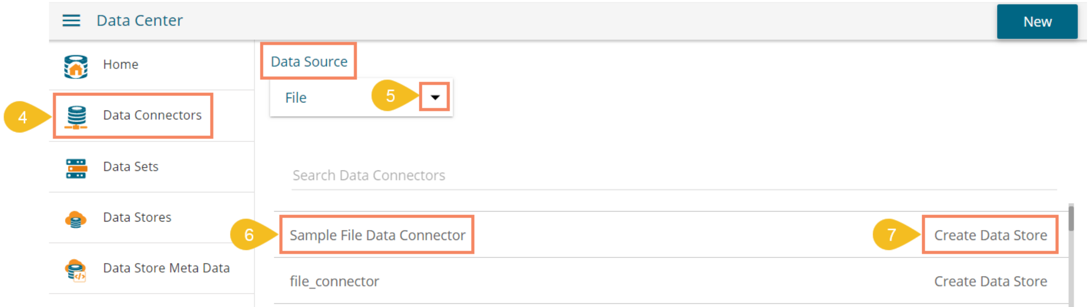


iv) The Data Connectors page opens.

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.



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

Step 1- Getting Data

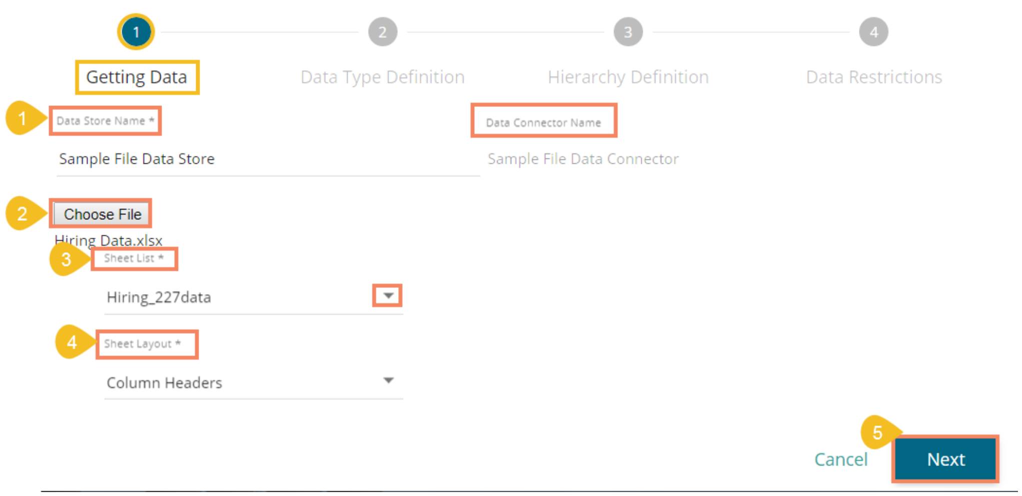
i) Enter a name for the Data Store. The **Data Connector Name** displays the pre-selected.

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.



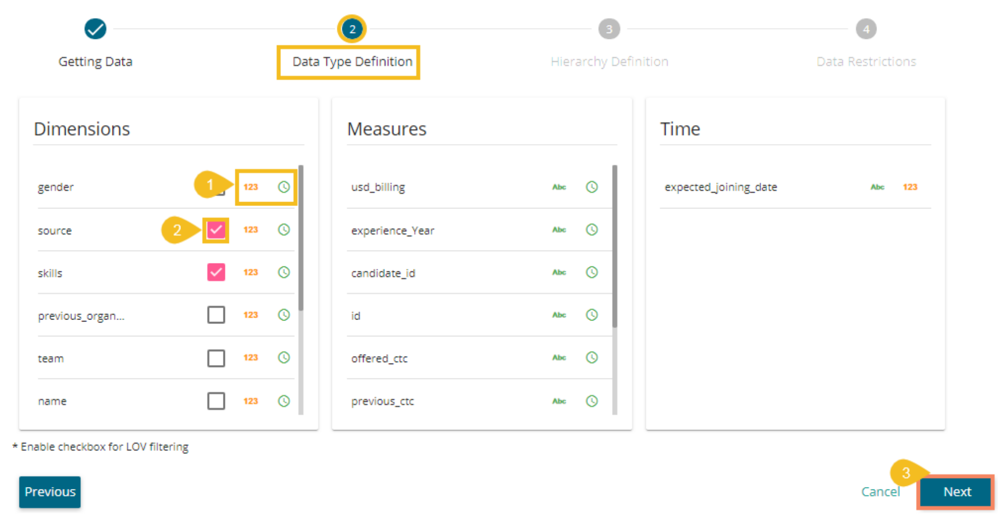
Note: The user can choose an Excel or CSV file as a file data connector.

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.



Step 3- Hierarchy Definition

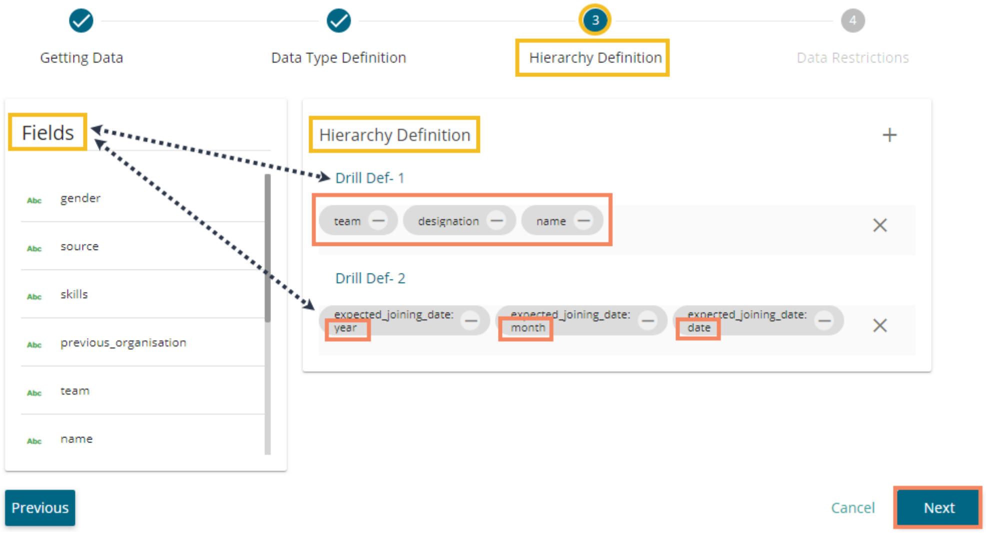
Define hierarchy using multiple dimensions or dropping the selecting time fields in the Drill Definition box.

i) Click the '**Add**' option + provided in the Hierarchy Definition window.

ii) A new '**Drill Def**' box gets added to the screen.

iii) Drag and drop the dimensions or time options to define a hierarchy.

iv) Proceed to the next tab by clicking the '**Next**' option.

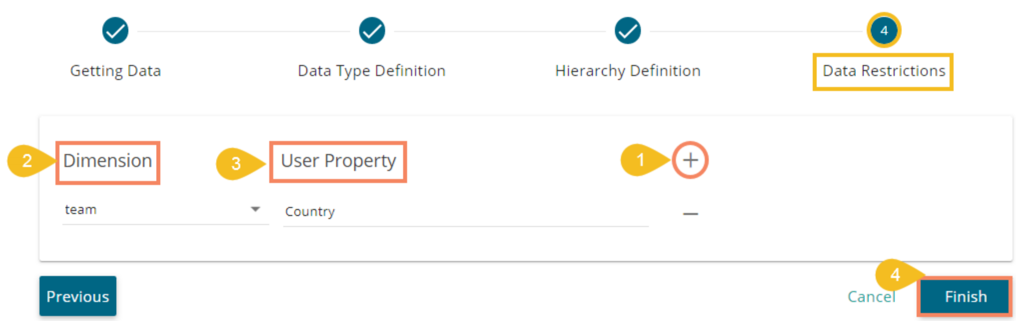


Step 4- Data Restriction

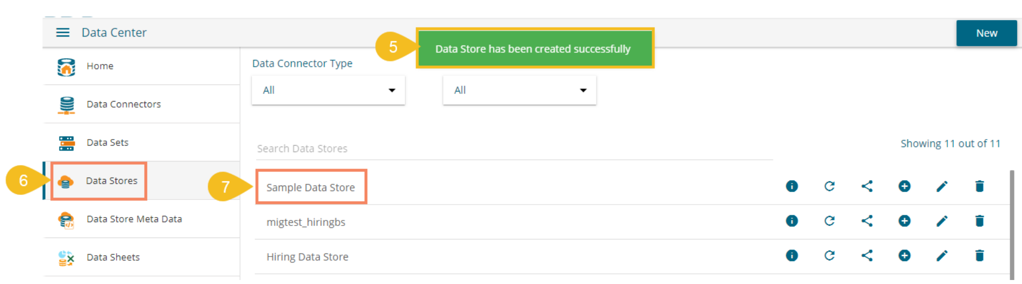
The Administrator can restrict access to data for a specific user by configuring the User Property via the '**Data Restriction**' tab.

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

i) Click 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.

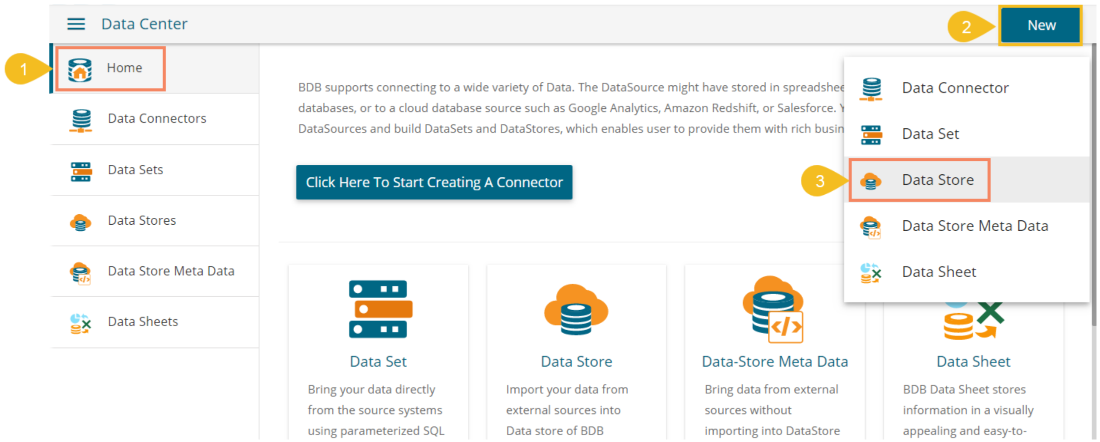


v) A success message appears to confirm the data store configuration.
vi) The Data Stores list opens.
vii) The newly created Data Store gets added to the Data Stores list.

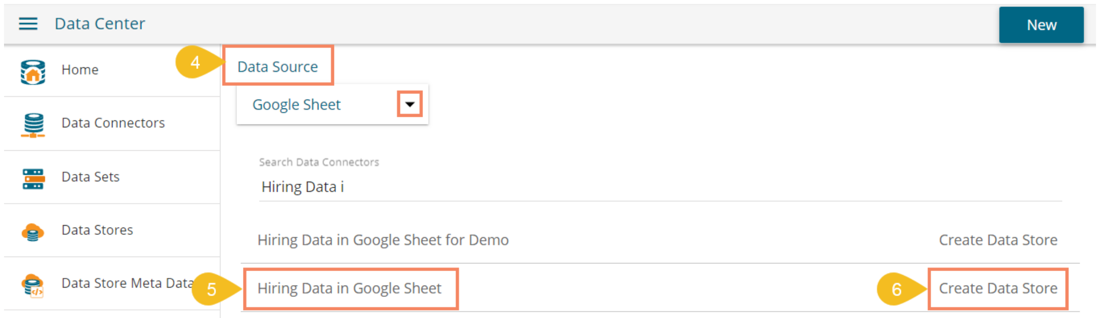


6.3.3. Creating a New Data Store Using an API Data Connector

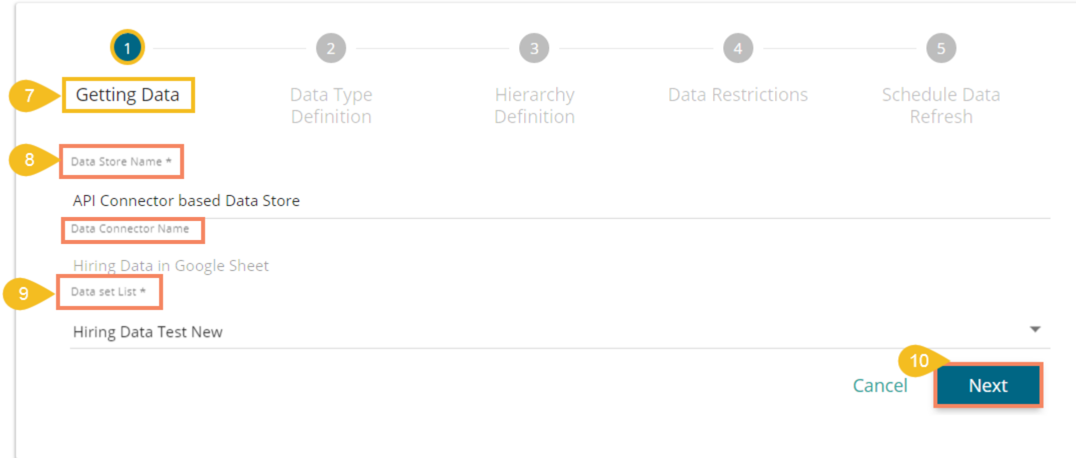
i) Navigate to the Data Center homepage.
ii) Click the '**New**' option.
iii) Select the '**Data Stores**' option from the context menu.



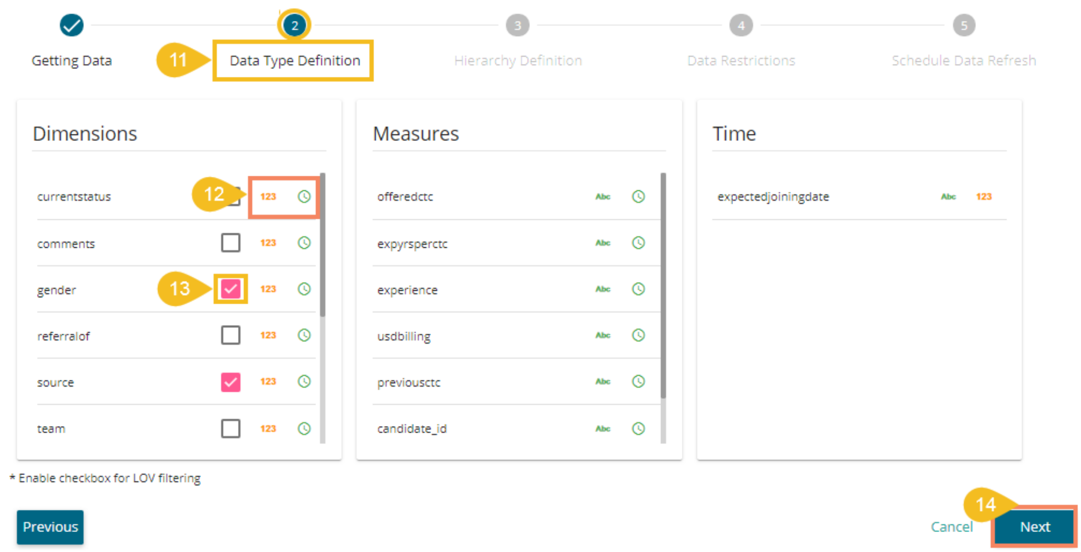
iv) Choose an API connector type from the filter panel.
v) Select a data connector from the displayed list.
vi) Click the '**Create Data Store**' option.



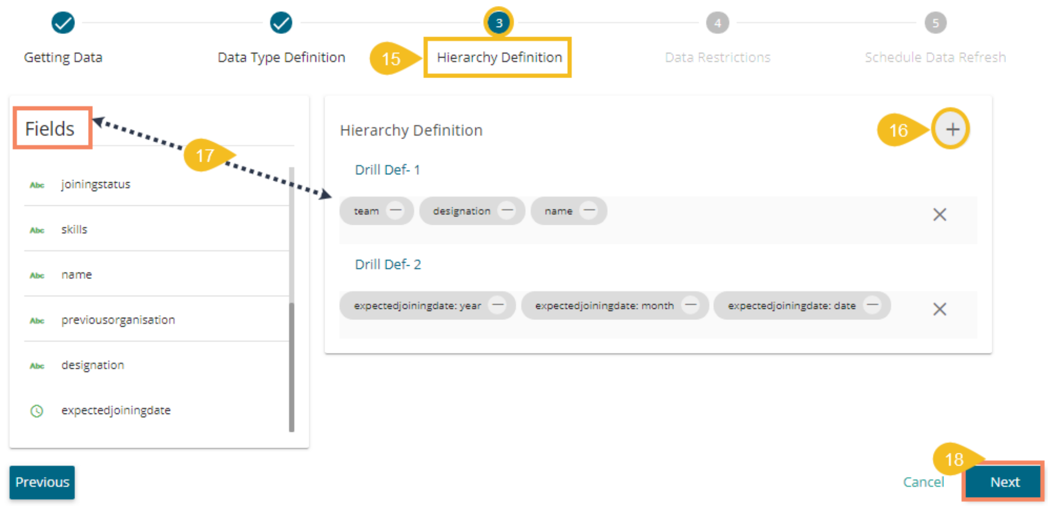
vii) The '**Getting Data**' tab opens.
viii) Provide a name for the Data Store. The name of the selected Data Connector gets displayed by default.
ix) Select a data set using the '**Data Set List**' drop-down menu.
x) Click the '**Next**' option.



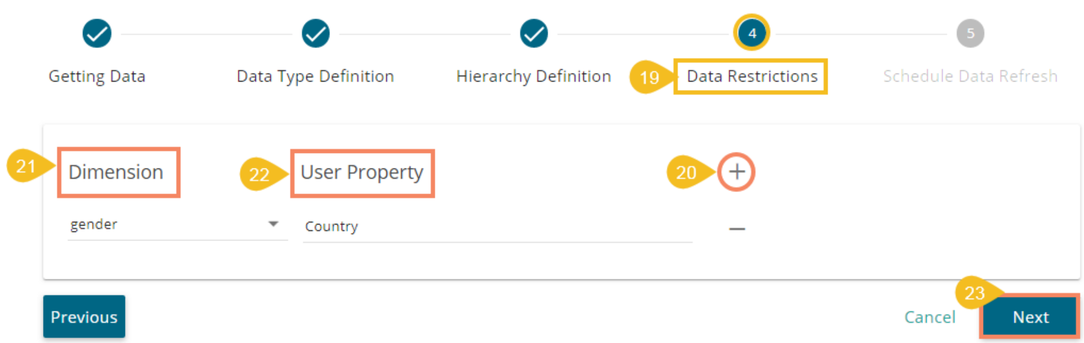
xi) The ‘**Data Type Definition**’ tab opens.
xii) The user can interchange the available Dimensions, Measures, and Time fields to define data.
xiii) Enable dimension fields with a checkmark to get in the LOV of the Filter pane of the Self-service BI Report.
xiv) Click the ‘**Next**’ option to proceed.



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.



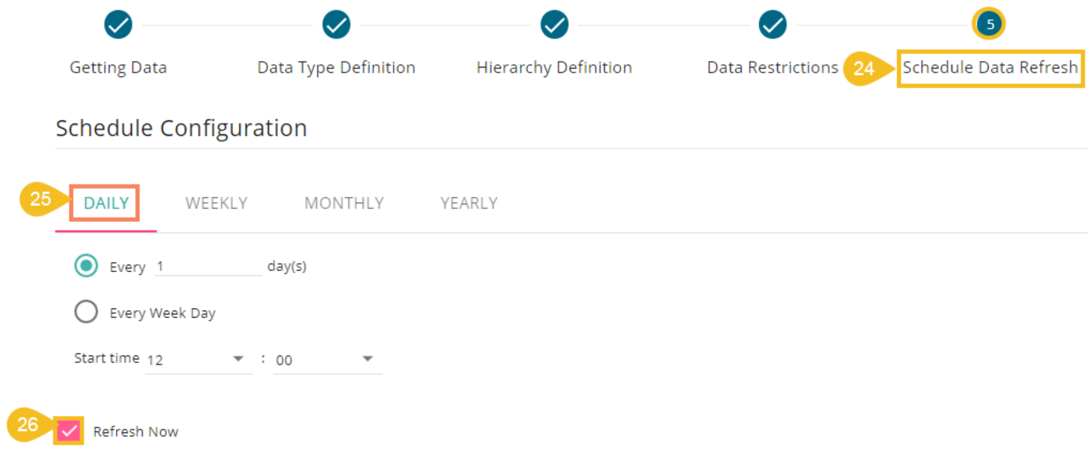
xix) The ‘**Data Restrictions**’ tab opens.
xx) Click the ‘**Add**’ icon.
xxi) Select a Dimension from the drop-down menu.
xxii) Enter a User Property based on the inserted custom fields of a specific user(s) or user group(s).
xxiii) Click the ‘**Next**’ option to proceed.



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

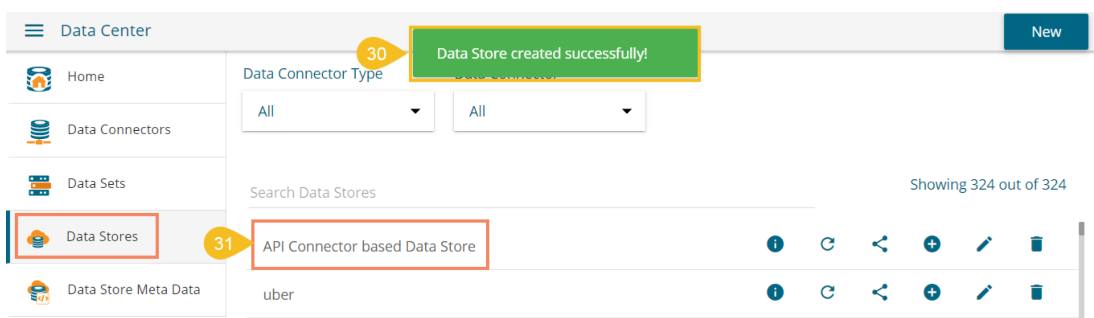
Select any one option from the above-given list and configure the required information to set the data refresh interval.

xxvi) Select the ‘**Refresh Now**’ option by enabling the box to refresh the Data Store immediately after its creation.



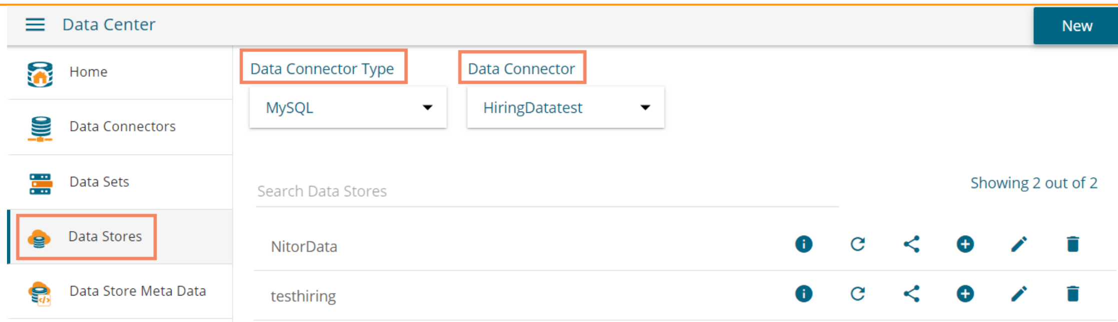
xxvii) Enable Email Notification by enabling the option.
xxviii) Provide the Email Address on which you want the notification email to be sent.
xxix) Click the ‘**Finish**’ option.

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.



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.

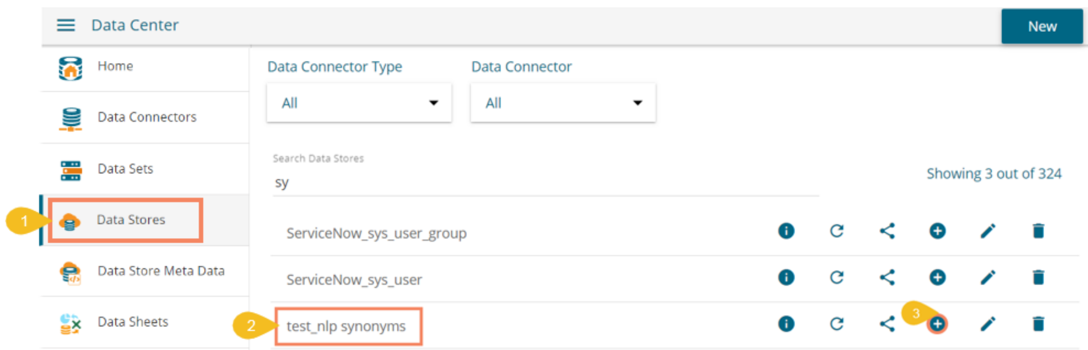


6.3.4. Adding Synonyms to a Datastore

i) Navigate to the Data Stores list.

ii) Select a datastore.

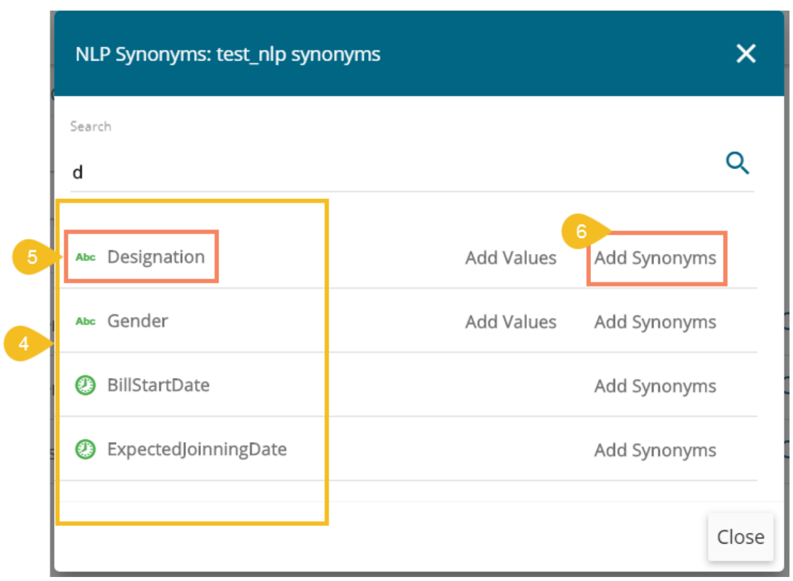
iii) Click the '**Add Synonym to Datastore**' option.



iv) All the Attributes get displayed in a list form.

v) Select a field.

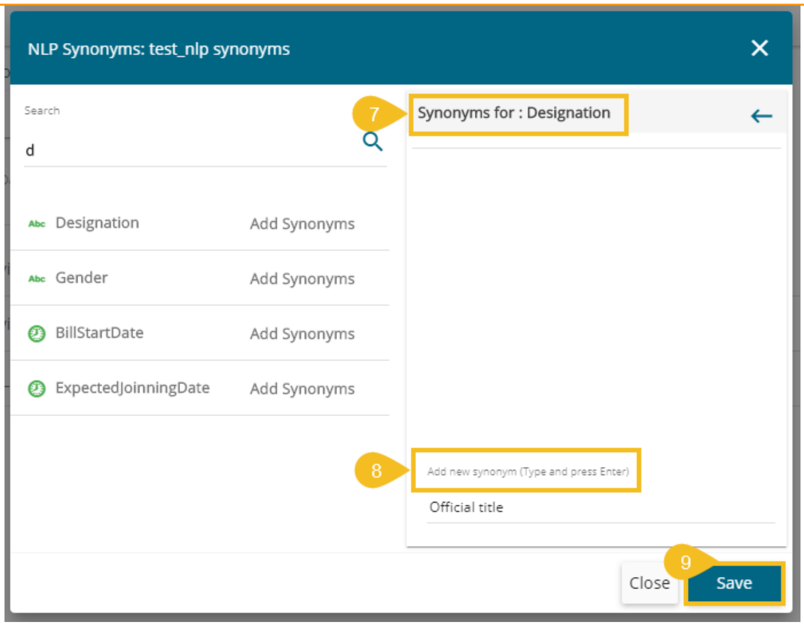
vi) Click the '**Add Synonyms**' option.



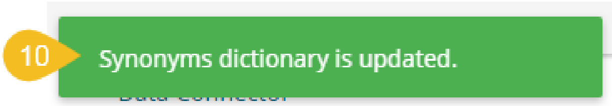
vii) A new window opens to add synonyms.

viii) Insert new synonyms in the specified space.

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

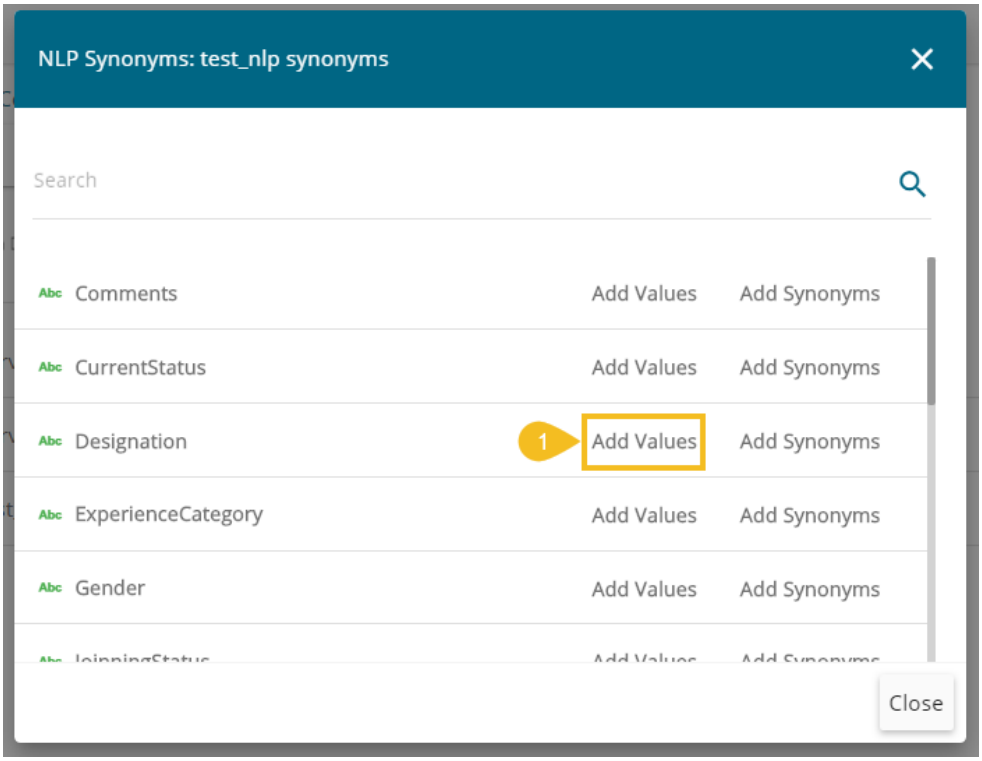


x) A success message appears to assure that the synonym dictionary is updated with the newly added synonym.



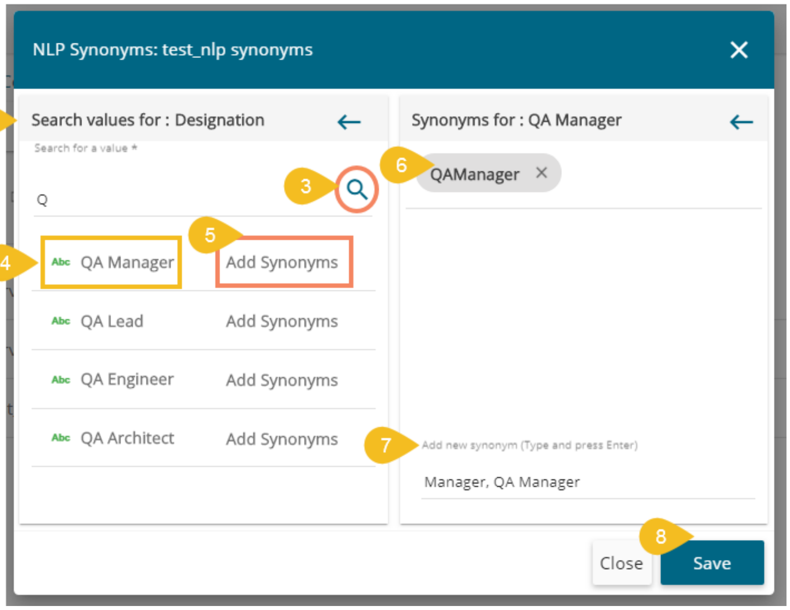
Note: Steps to Add Synonyms for a Dimension Value.

1. Click the '**Add Values**' option for a dimension from the displayed list of the data fields.

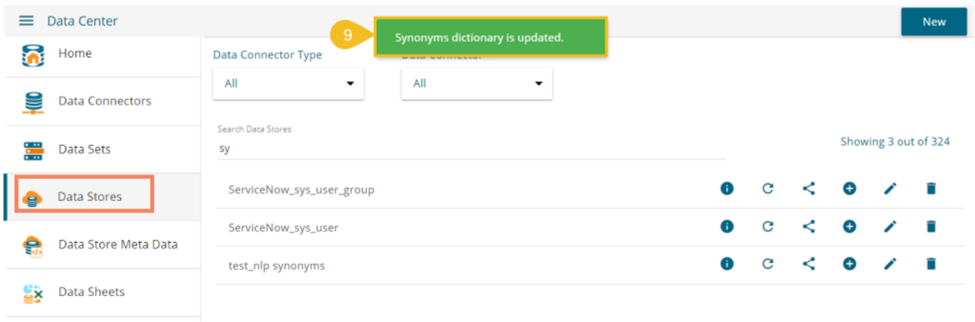


2. A new window opens to search values for the selected Dimension (E.g., Designation in the below image).

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.



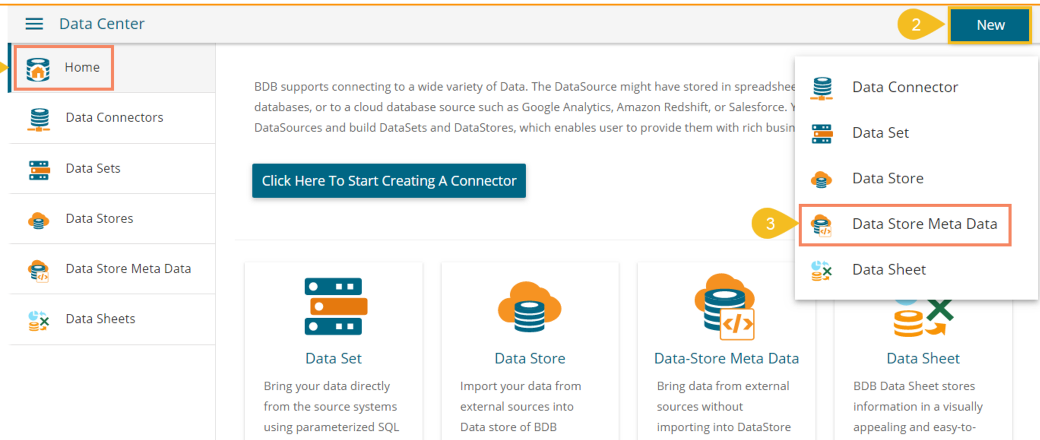
9. A success message appears to assure that the Synonyms dictionary is updated.



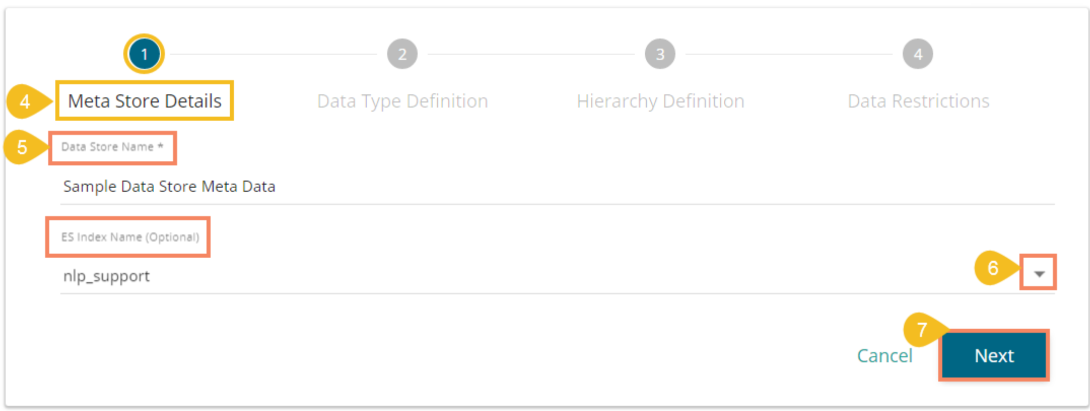
6.4. Data Store Meta Data

The Data Store Meta Data is a database created to store metadata. It is a structure/index in which the actual data can be stored/written using an application such as ETL.

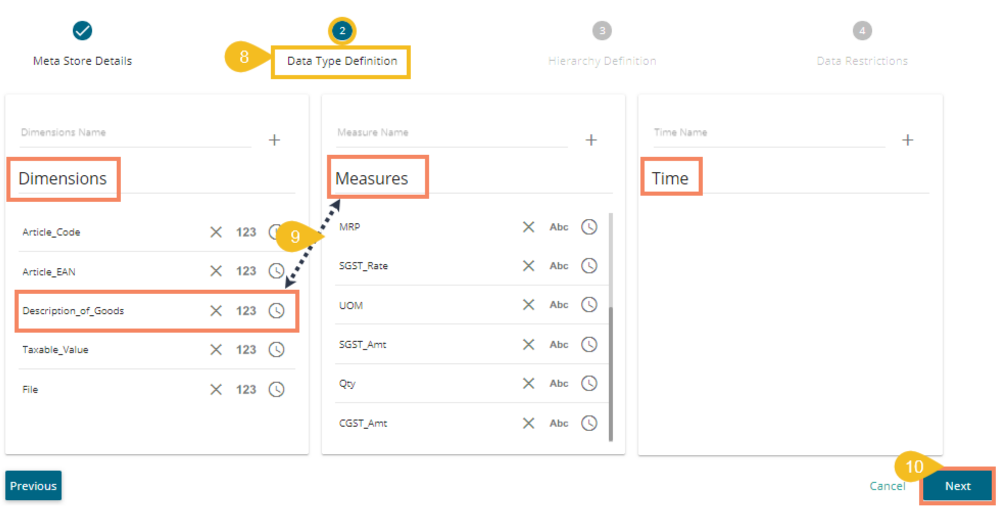
i) Navigate to the Data Center homepage.
ii) Click the '**New**' menu.
iii) Select the '**Data Store Meta Data**' option from the '**New**' context menu.



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



viii) Define the data type (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.



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

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

xi) The Hierarchy Definition tab opens.

xii) Click the '**Add**' icon + provided in the Hierarchy Definition window.

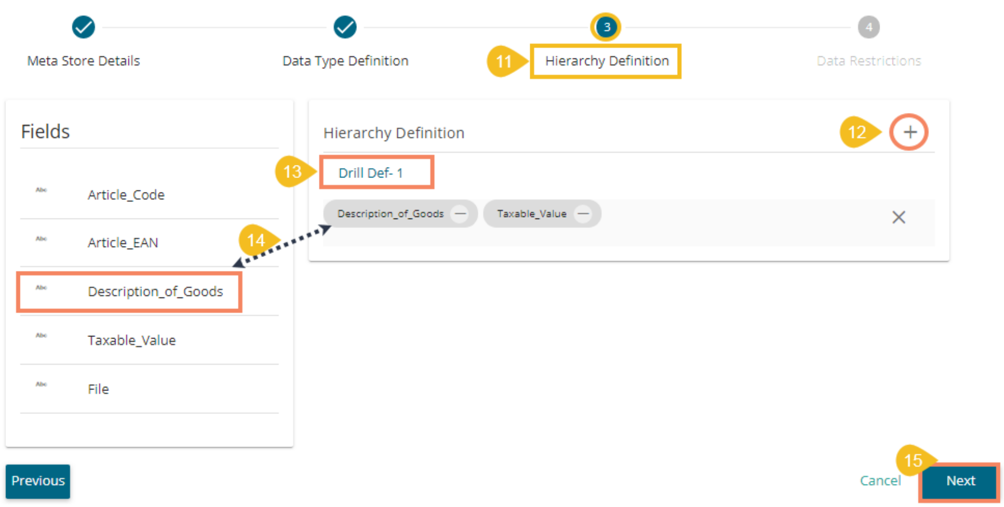
xiii) A new '**Drill Def**' box gets added to the page.

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.

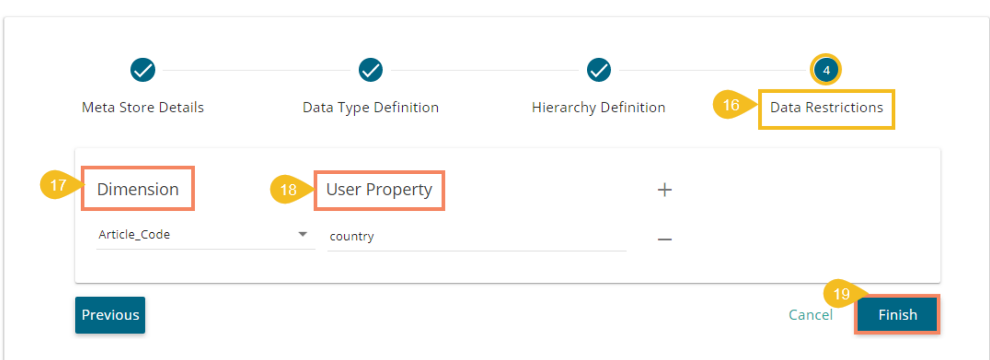


xvi) The '**Data Restrictions**' tab opens. The Data Restriction tab allows the user/user group to access data as per the selected '**User Property'** options.

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

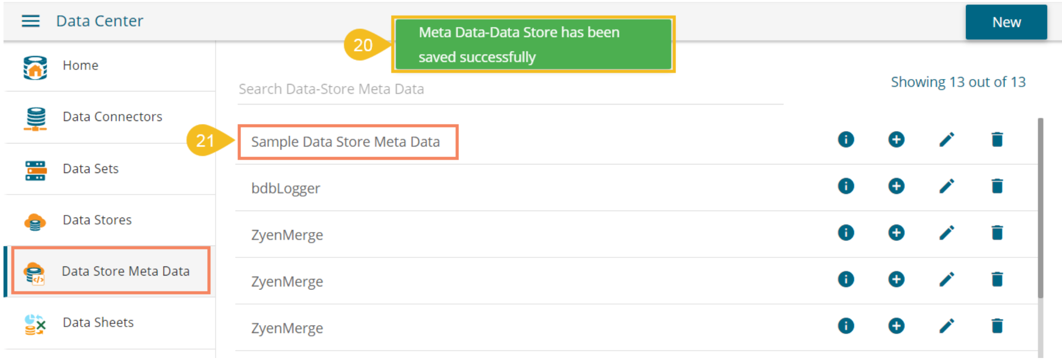
xviii) Enter a User Property to create a filter parameter based on the user.

xix) Click the '**Finish**' option.



xx) A success message appears to confirm that the configuration got saved.

xxi) The newly created Meta Data gets added to the list displayed on the left pane of the page.



Option	Name	Task
	Store Details	Displays the Store information via a pop-up window
	Add Synonyms to Metadata Store	Redirects the user to add synonyms to the selected Metadata store.
	Edit	Edits the data store metadata fields
	Remove	Removes the data store metadata from the list

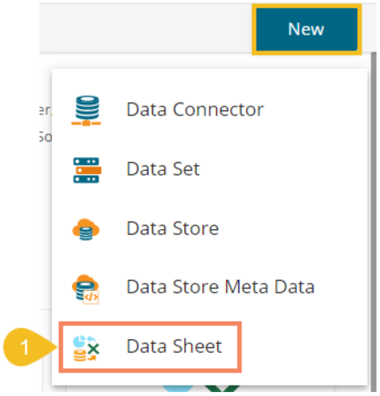
6.5. Data Sheet

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.



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

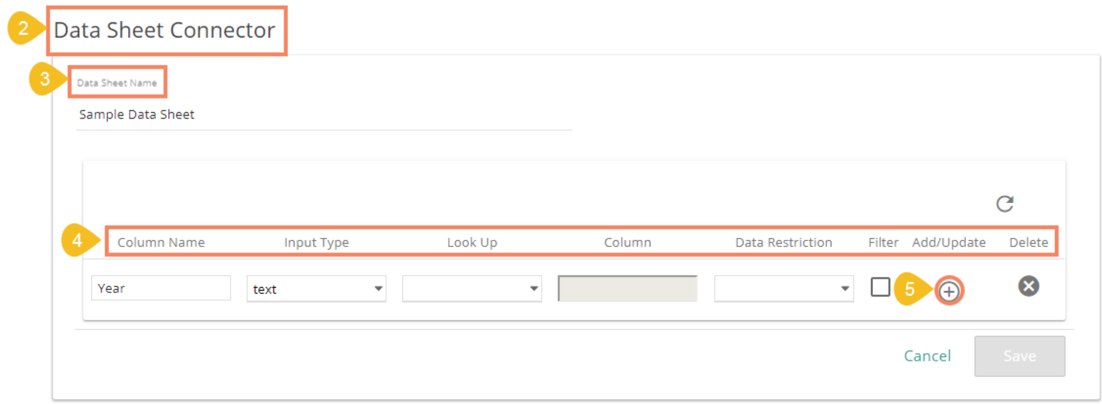
d. Formula/Column

e. Data Restriction

f. **Filter:** Enable the filter by putting a checkmark in the given box.

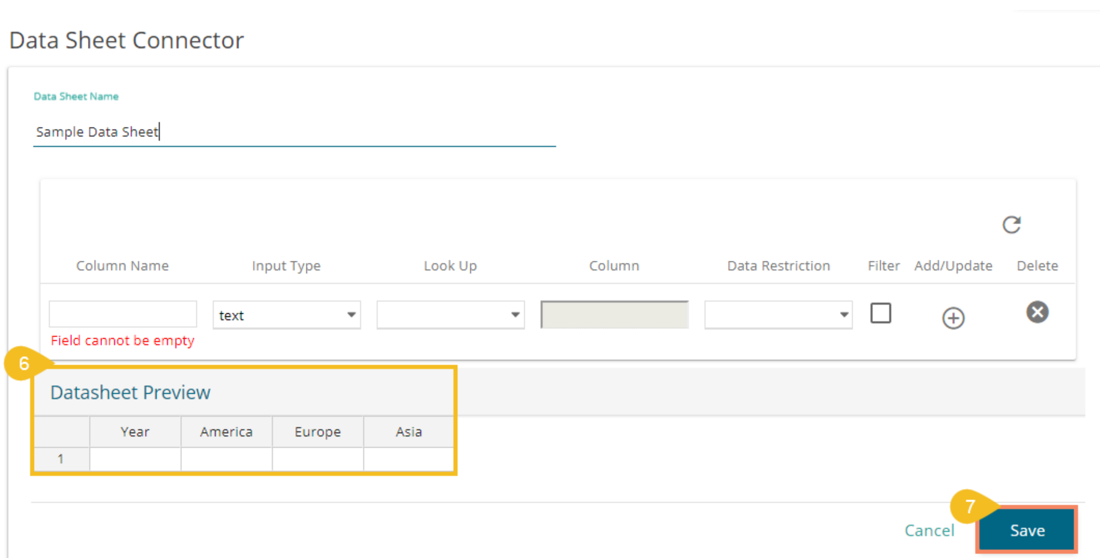
g. **Delete**: Remove the added data sheet information.

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



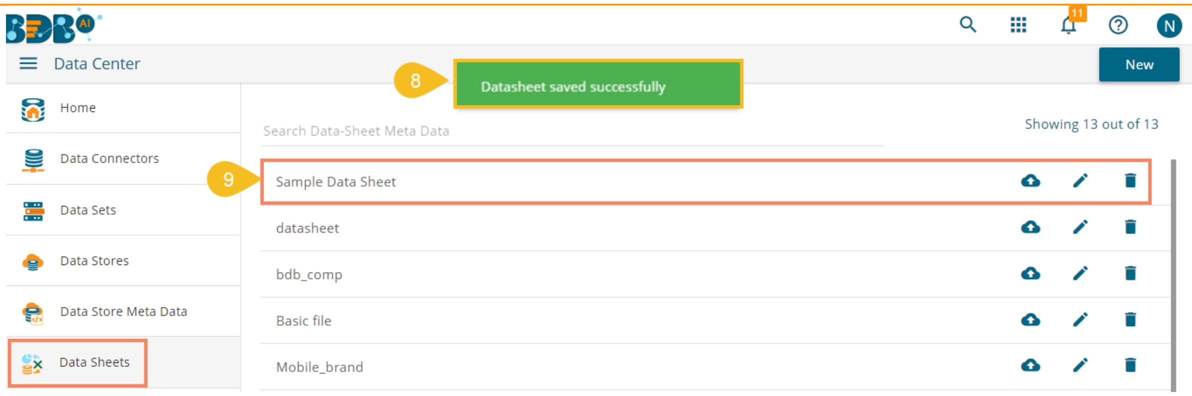
vi) The Datasheet Preview gets displayed with the newly created Column(s) added below. The user gets the same set of fields to create another column to the current Data Sheet.

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



viii) A success message appears.

ix) The newly created Data Sheet gets added to the Data Sheets list.



Note:

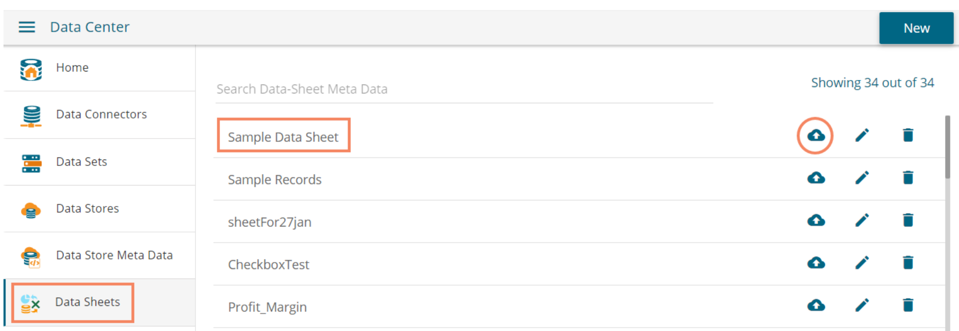
a. Click the '**Refresh**' icon to refresh the Column design fields. The data in the design area gets cleared.

b. Click the 'Delete' icon to delete the selected column.

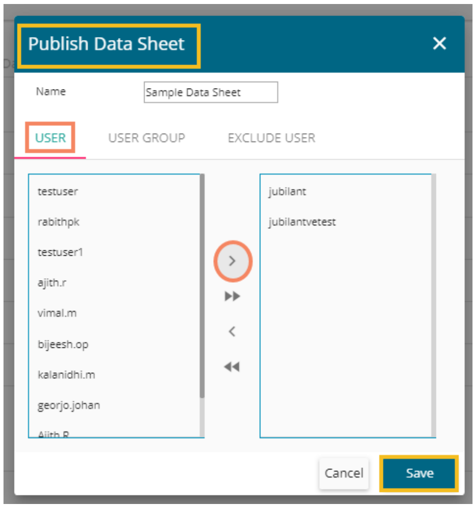
6.5.2. Publishing a Data Sheet

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.

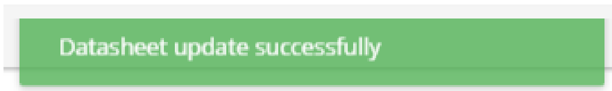


iv) The Publish Data Sheet window opens.
v) Select the user(s) by using the USER tab/ user group(s) by using the USER GROUP tab.
vi) Click the '**Save**' option.

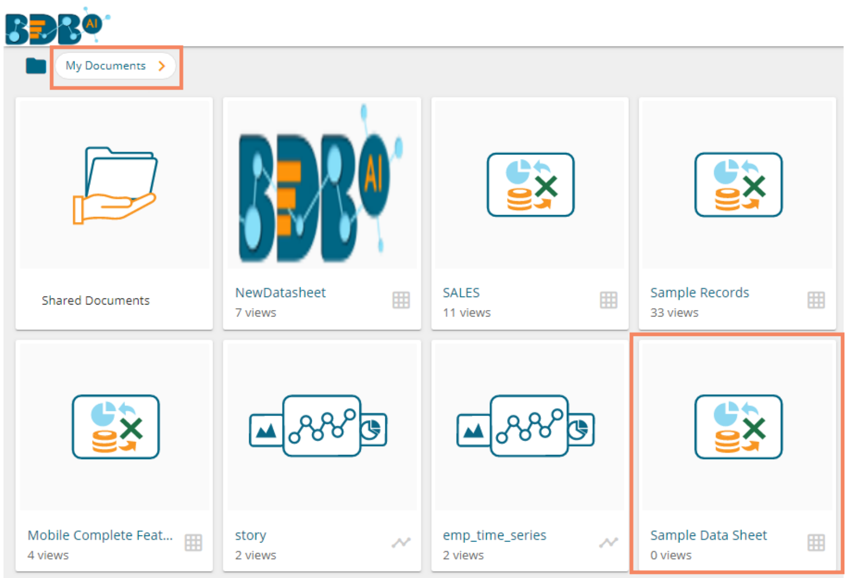


vii) A success message appears to inform the user that the dashboard has been saved.

viii) Another success message appears to inform the user the datasheet has been updated successfully.

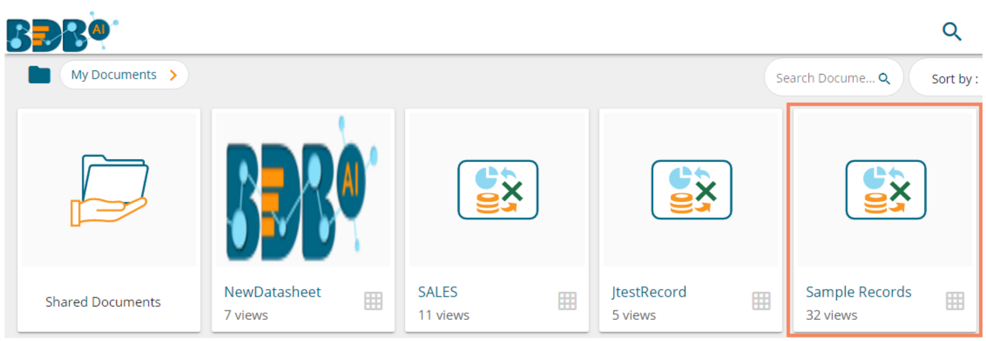


ix) The selected Data Sheet gets published under the My Documents space.

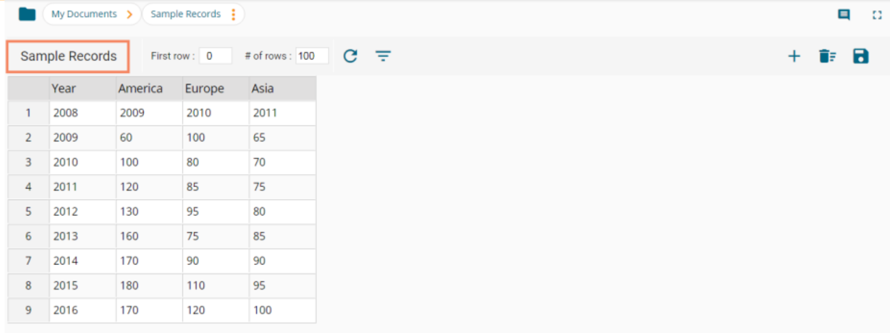


6.5.2.1. Opening a Published Data Sheet.

i) Use a click on the published Data Sheet to open it.



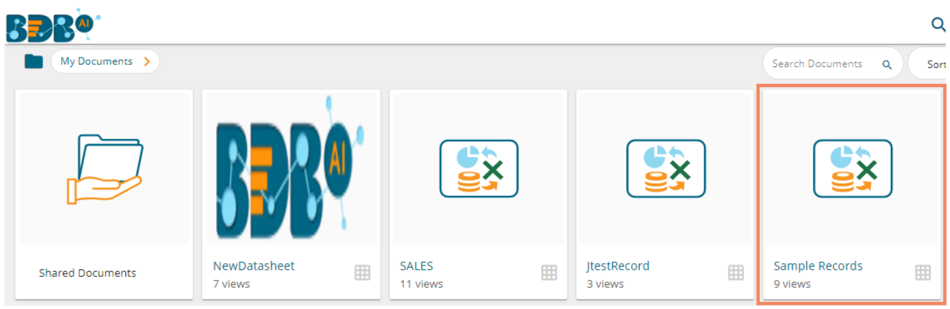
ii) The Data Sheet opens displaying the data table.



6.5.2.2. Copying Excel Data into a Published Data Sheet

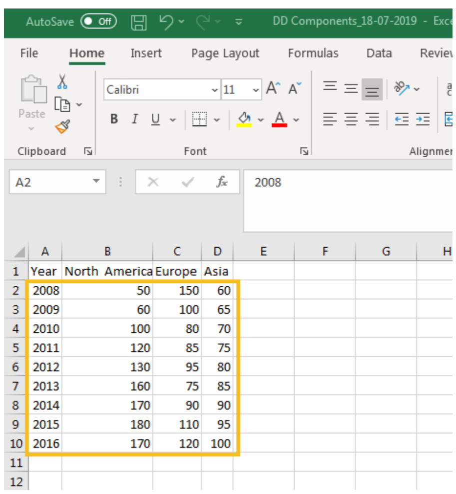
The user can create a meta-structure of the Data Sheet using the Data Center module and later insert data from an excel file. The user can directly copy and paste data to the published Data Sheet.

i) Open a published Datasheet from My Documents.



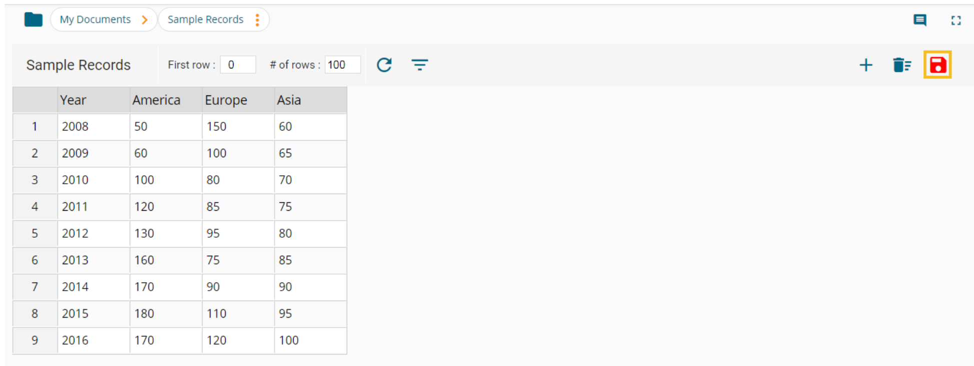
ii) The meta-structure of the selected Data Sheet opens.

iii) Copy the required data from an excel sheet.



iv) Paste it to the Data Sheet metadata-structure.

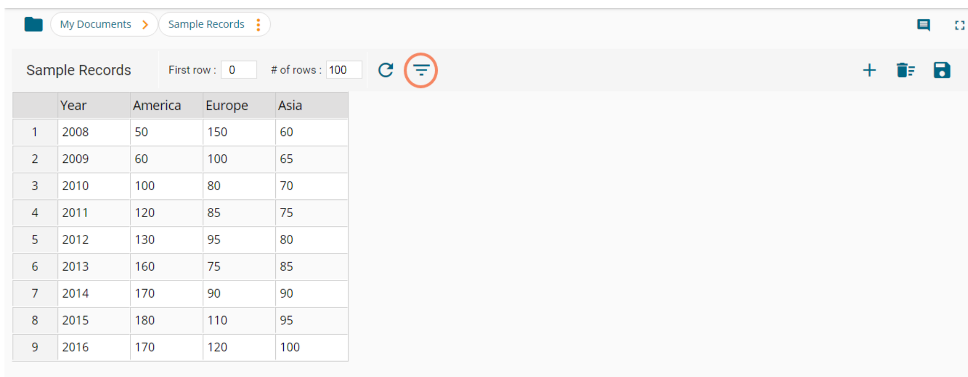
v) Click the '**Save**' icon to save the copied data.



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.



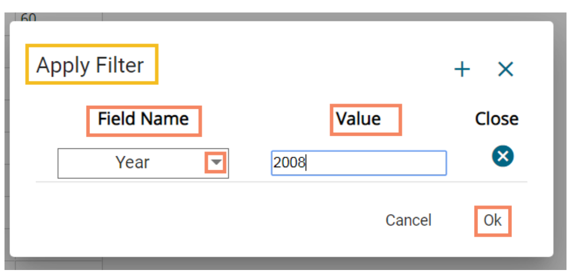
ii) The '**Filters**' window opens.

iii) Provide the following information

a. Field Name

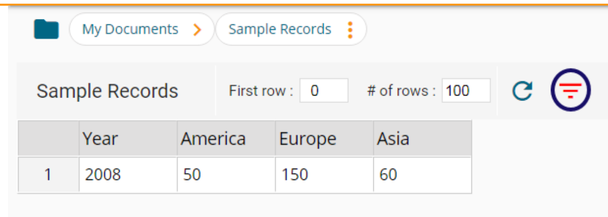
b. Value

c. Click the '**Apply**' option.



iv) The data preview gets filtered as per the inserted condition.

v) Click the '**Clear Filter**' icon to clear the applied filter condition.

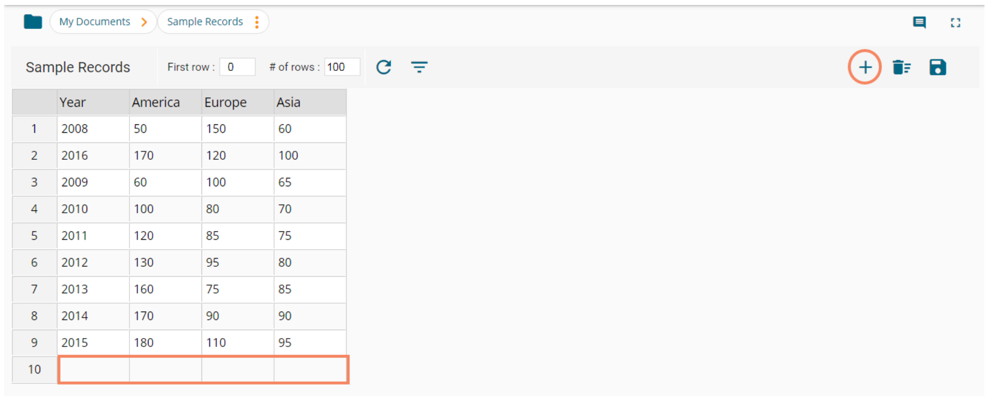


vi) The filter condition gets cleared and the original values appear for the Data Sheet.

6.5.2.4. Adding a New Row

i) Click the '**Add Row**' icon from the preview page of the Data Sheet.

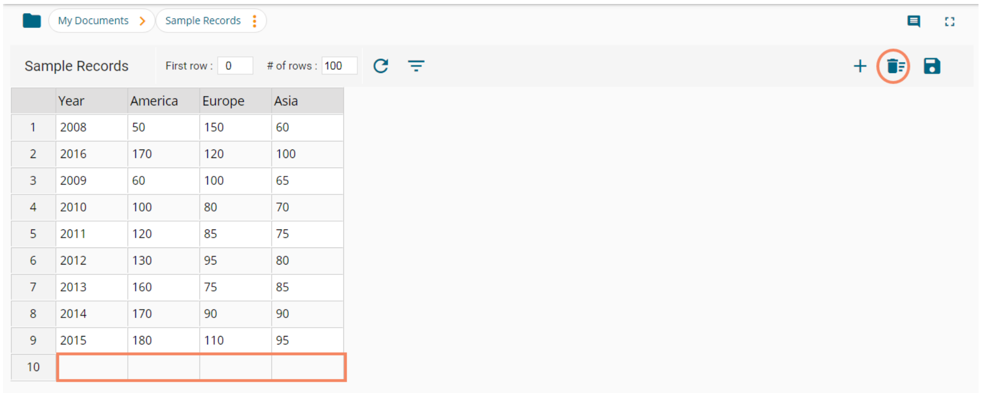
ii) A new row gets added at the bottom.



6.5.2.5. Deleting a Row

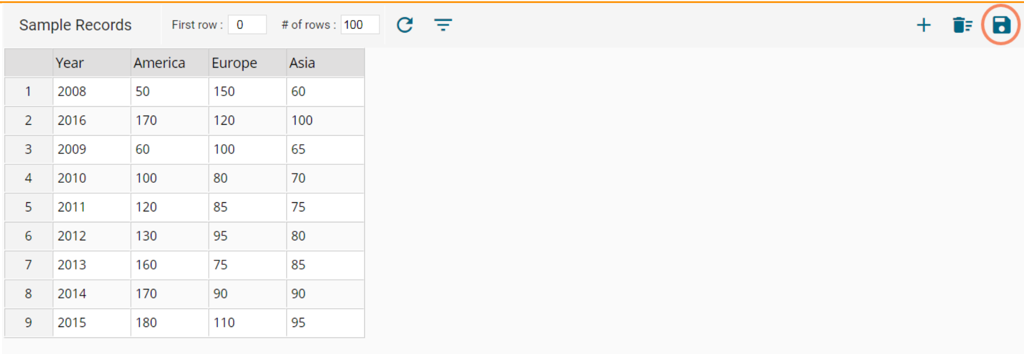
i) Select a row from the data sheet preview.

ii) Click the '**Delete Row**' icon.



iii) The selected row gets deleted from the Data Sheet preview.

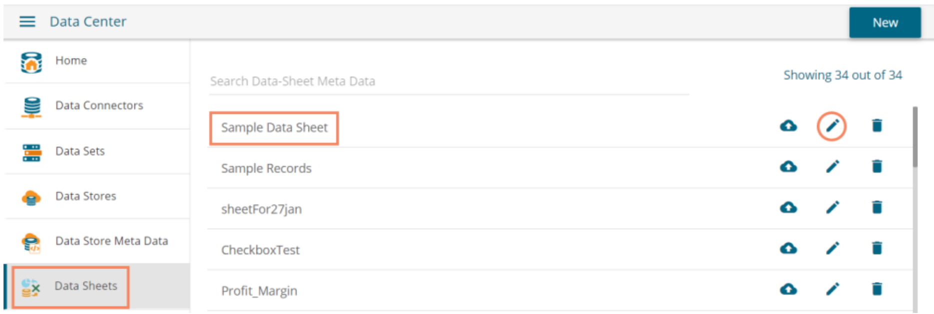
Note: The user should click the '**Save**' icon after adding or removing new row(s) to save the updated data in the selected Data Sheet.



	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

6.5.3. Editing a Data Sheet

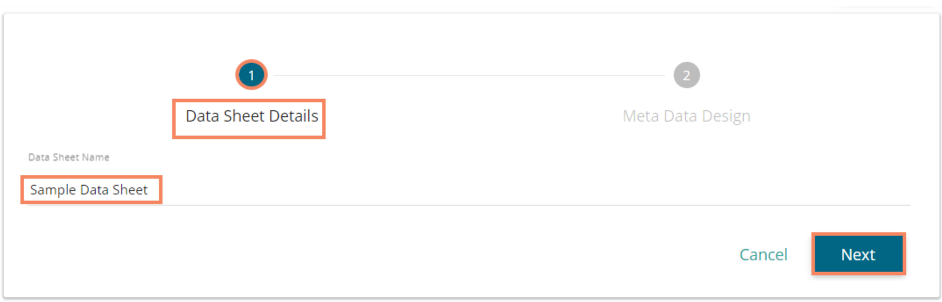
i) Click the '**Edit**' icon from the Data Sheet list page.



ii) The '**Data Sheet Details**' tab opens for the selected Data Sheet.

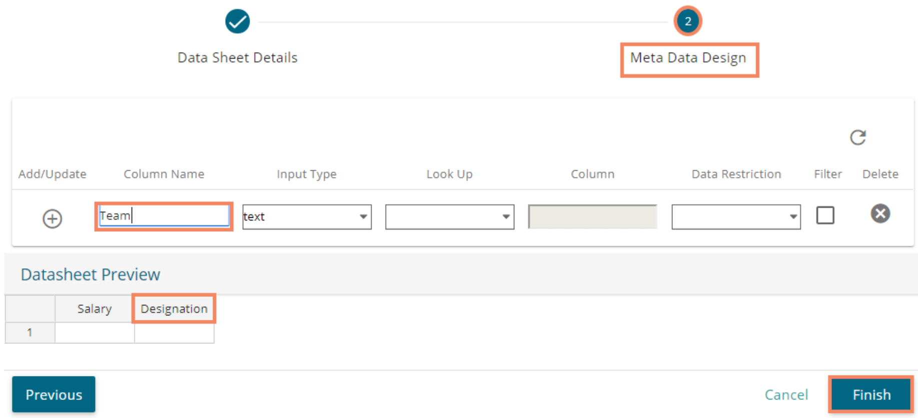
iii) The user can edit the required information.

iv) Click the '**Next**' option.

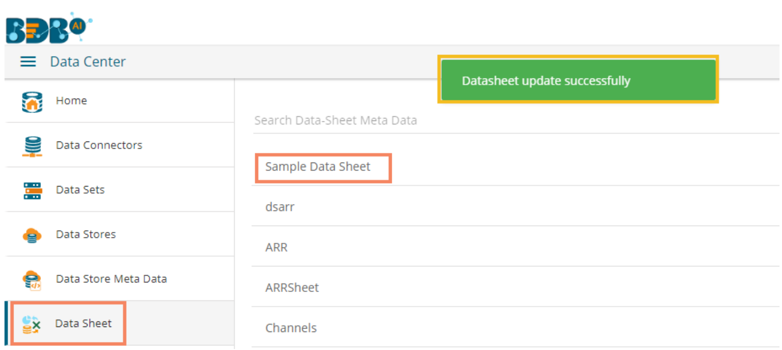


v) The '**Meta Data Design**' page opens.

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

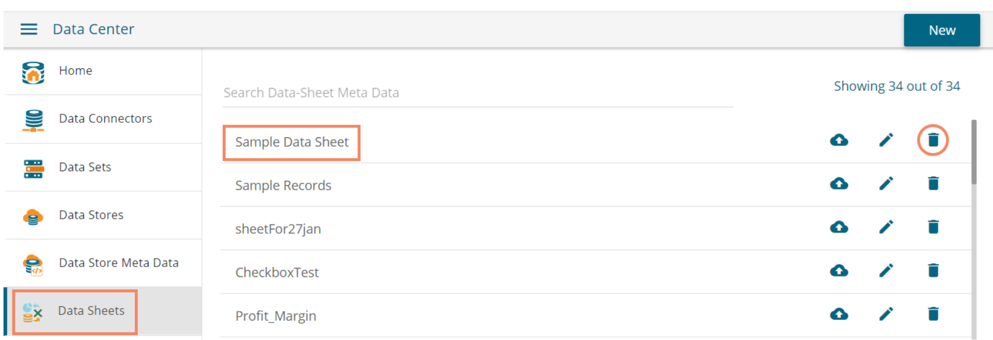


vii) A success message appears to inform the user that the selected Data Sheet has been updated.



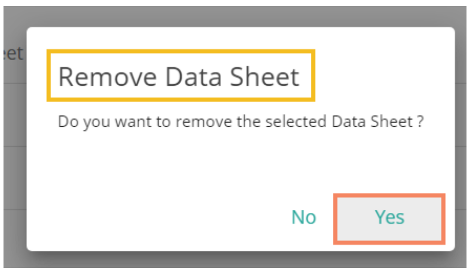
6.5.4. Removing a Data Sheet

i) Click the '**Delete**' icon from the Data Sheet list page.

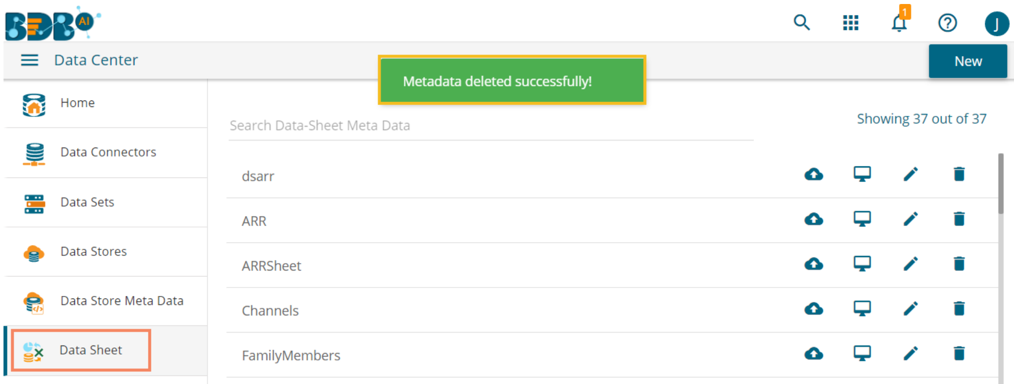


ii) The Remove Data Sheet window opens to confirm the deletion of the selected Data Sheet.

iii) Select the '**Yes**' option.



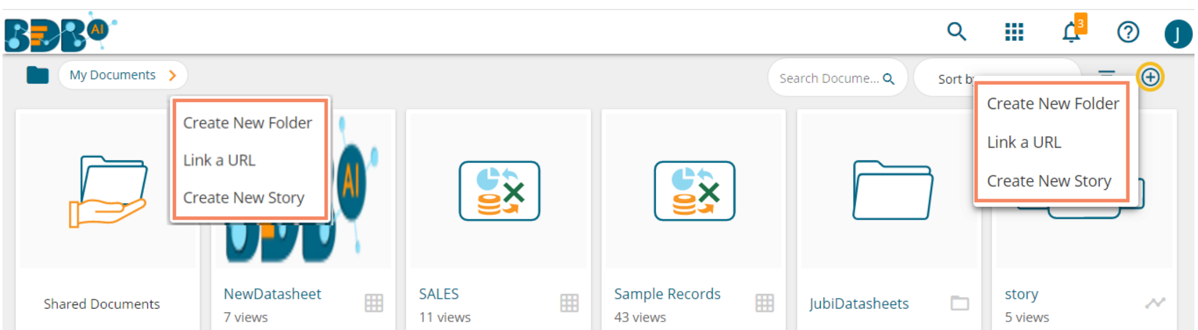
iv) A success message appears, and the selected Data Sheet gets removed.



7. Options

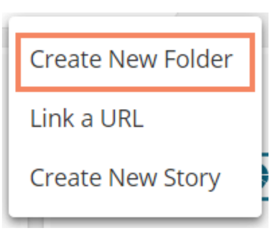
The user can access options like Create New Folder, link a URL, or Create New Story on the homepage of the BDB Platform.

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.



7.1. Creating a Folder

i) Select the '**Create New Folder**' from the Options context menu.



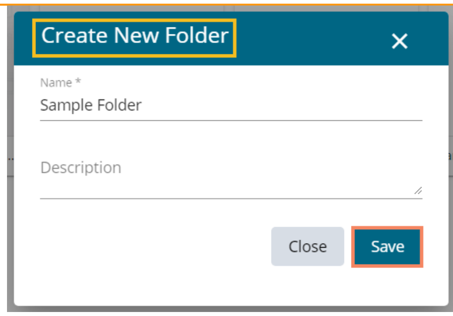
ii) A pop-up window appears.

iii) Fill in the following information:

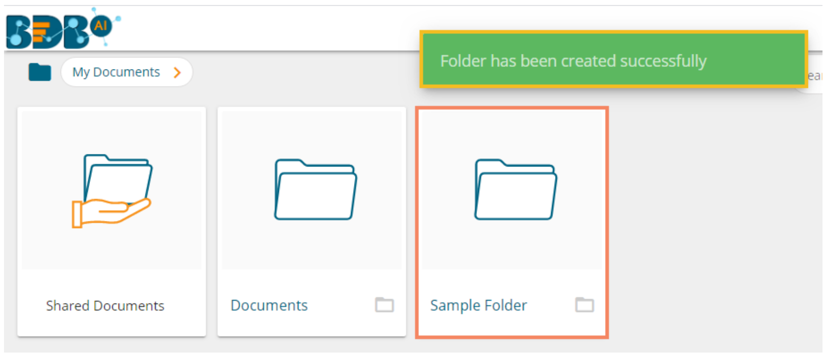
a. **Name**: Enter a folder name

b. **Description**: Describe the folder (optional)

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

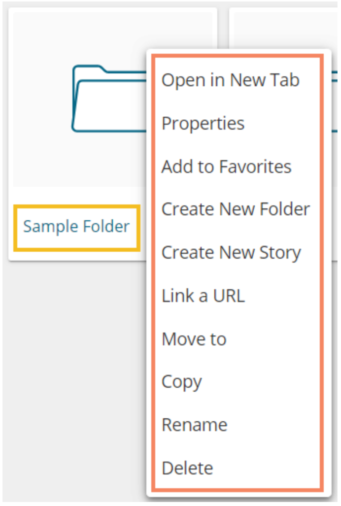


v) A success message appears.
vi) The newly created folder gets added to the selected document space.



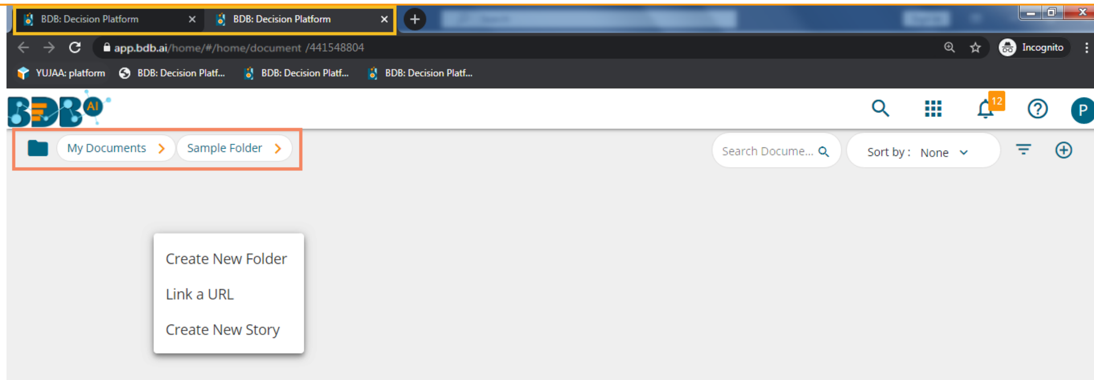
- **Options Assigned to a Folder**

  A single folder is credited with various operations in a context menu by using a right-click on it as displayed below:



7.1.1. Open in New Tab

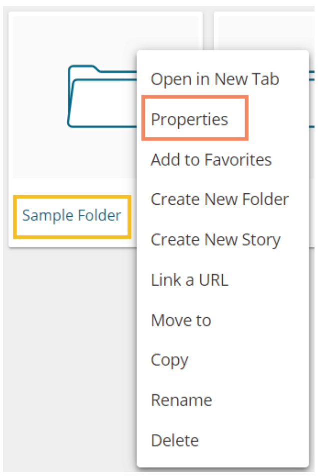
i) Select a folder.
ii) Select the '**Open in New Tab**' option using the Folder options context menu.
iii) The concerned folder opens in a new tab.



7.1.2. Properties

i) Select a folder.

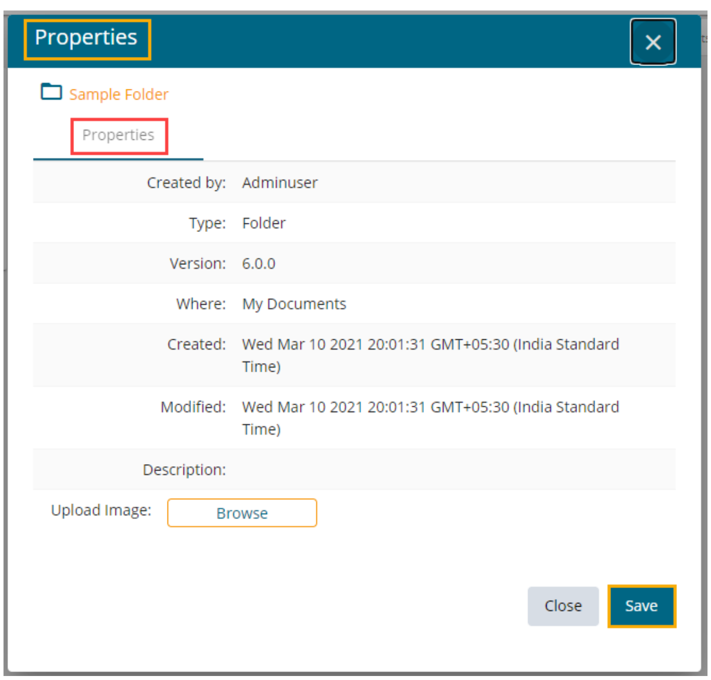
ii) Select the '**Properties**' option from the context menu.



iii) The folder properties open.

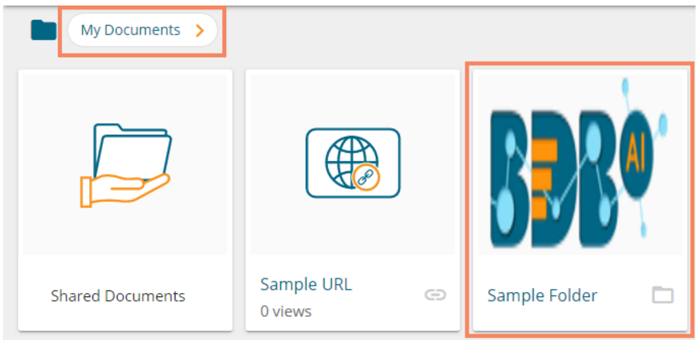
a. Click the '**Browse**' option to update the image.

b. Click the '**Save**' option to save the update.



iv) A success message appears, “Image has been updated successfully!”

v) The image gets uploaded.

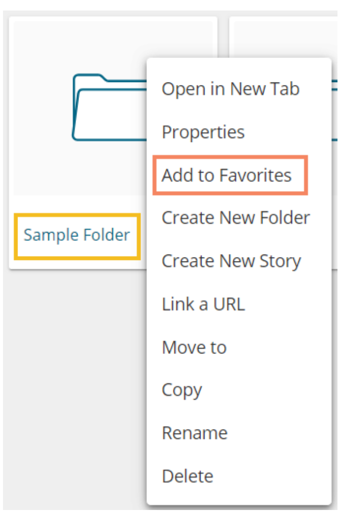


Note: Click the ‘**Close**’ option to close the folder properties.

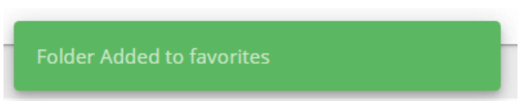
7.1.3. Adding/Removing a Folder to/from Favourites

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

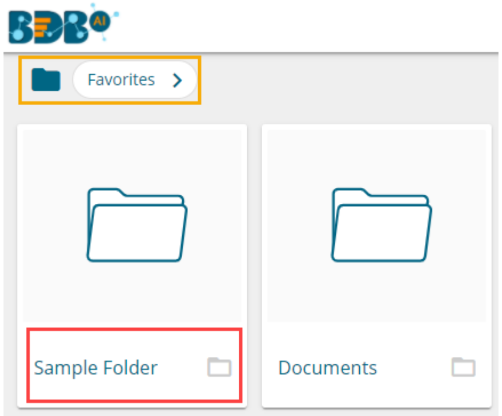
i) Select the ‘**Add to Favorites**’ option from the Folder context menu.



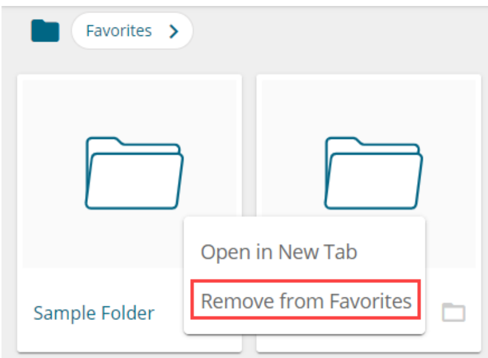
ii) A message appears, “**Folder added to favorite**s!”



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

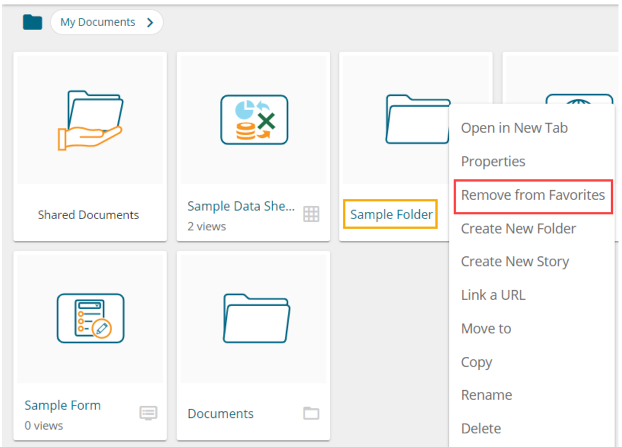


iv) Open the '**Favorites**' documents space.
v) Use the right-click on the folder that you wish to remove.
vi) The '**Remove from Favorites**' option.
vii) Click the '**Remove from Favorites**' option.

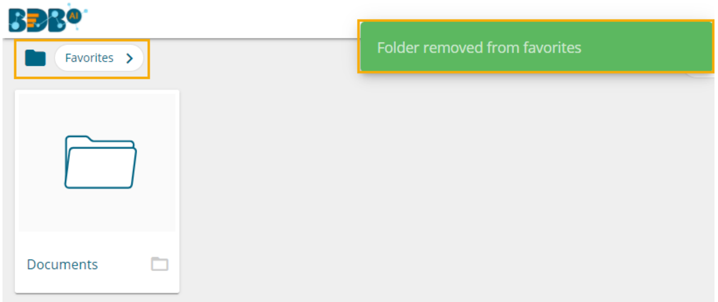


OR

Navigate to My Documents and use right-click on the same folder. Click the '**Remove from Favorites**' option.

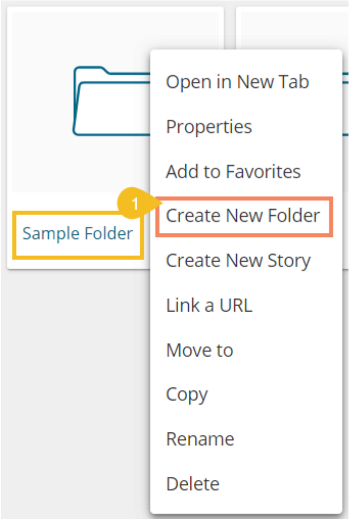


viii) A message, "**Folder removed from Favorites**" appears on the screen, and the selected folder gets removed from the '**Favorites**' document space.



7.1.4. Creating a New Folder (Sub-Folder)

i) Select the '**Create New Folder**' option by using right-click on a Folder.



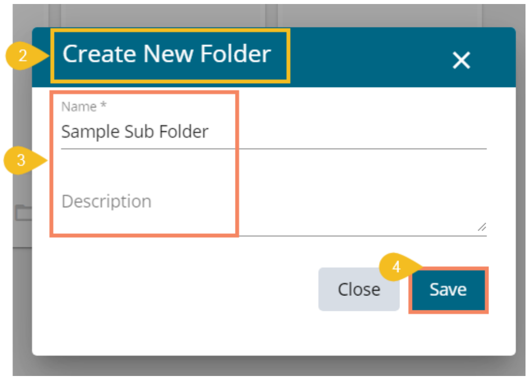
ii) The Create New Folder window opens.

iii) Fill in the following information:

a. **Name**: Enter a folder name

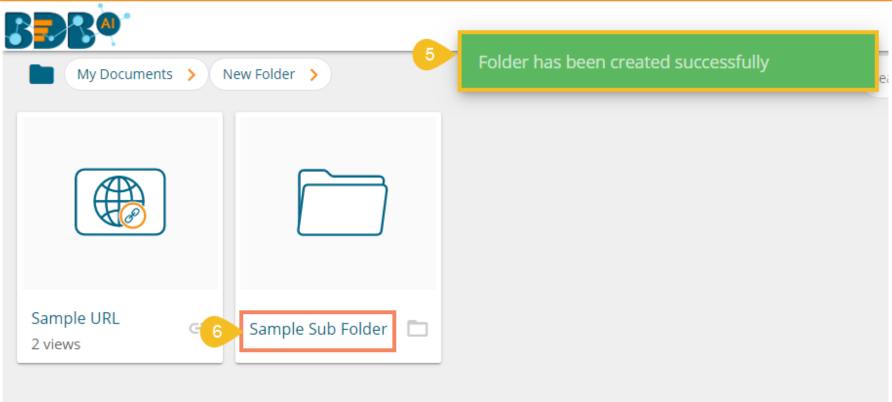
b. **Description**: Describe the folder (optional)

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



v) A success message appears for the folder creation.

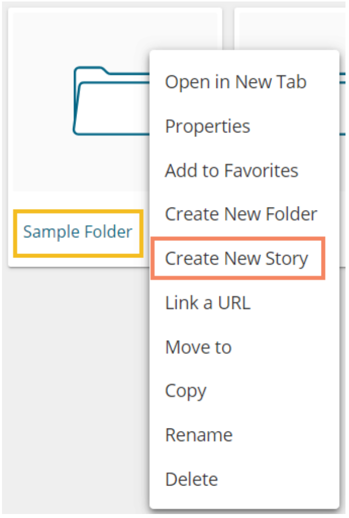
vi) A new (sub) folder gets created inside the selected folder.



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.

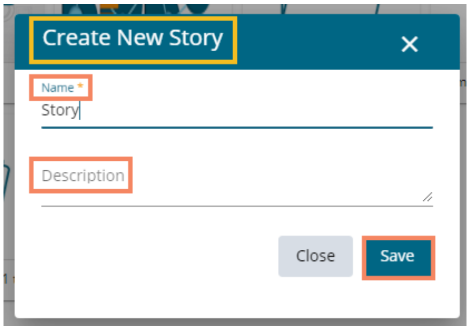


ii) The '**Create New Story**' window opens.

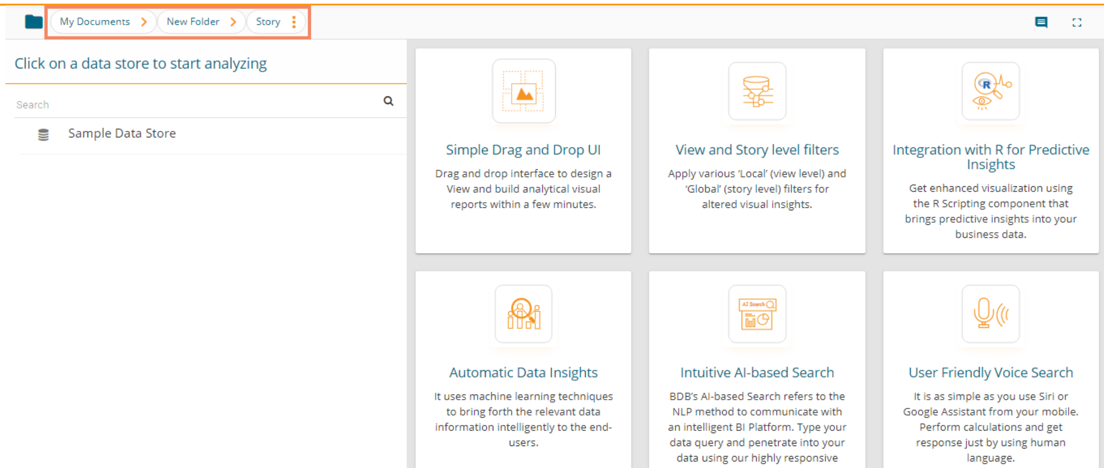
iii) Enter a title for the story document.

iv) Describe the story document (optional).

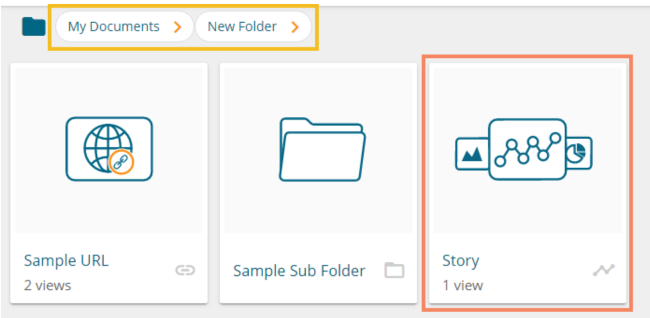
v) Click the '**Save**' option.



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



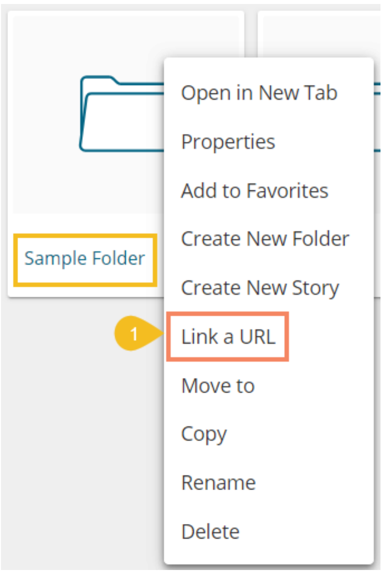
vii) Navigate to the folder.
viii) The Story document gets added to the selected folder.



7.1.6. Linking a URL

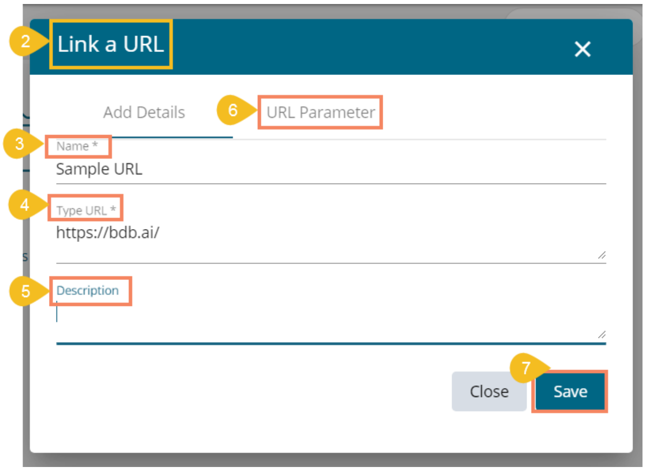
The user can connect a URL to the required platform documents.

i) Select the '**Link a URL**' option from the context menu that opens by clicking on a folder.

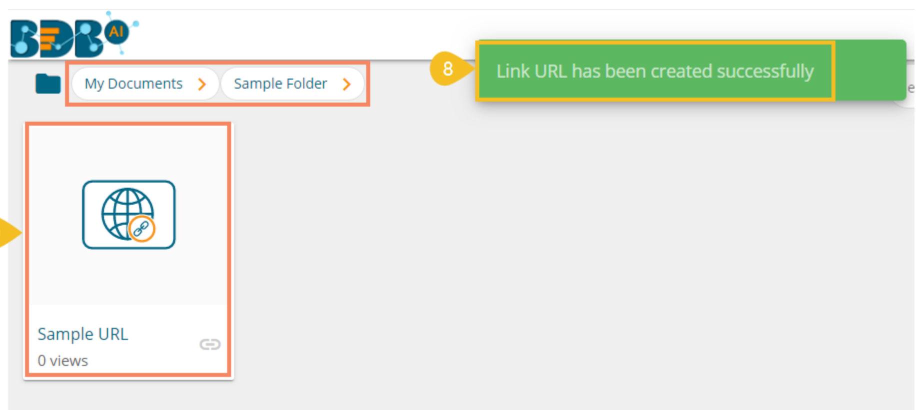


ii) The Link a URL window opens.
iii) Enter a name for the URL.
iv) Provide the URL link that you wish to add in the '**Type URL**' field.

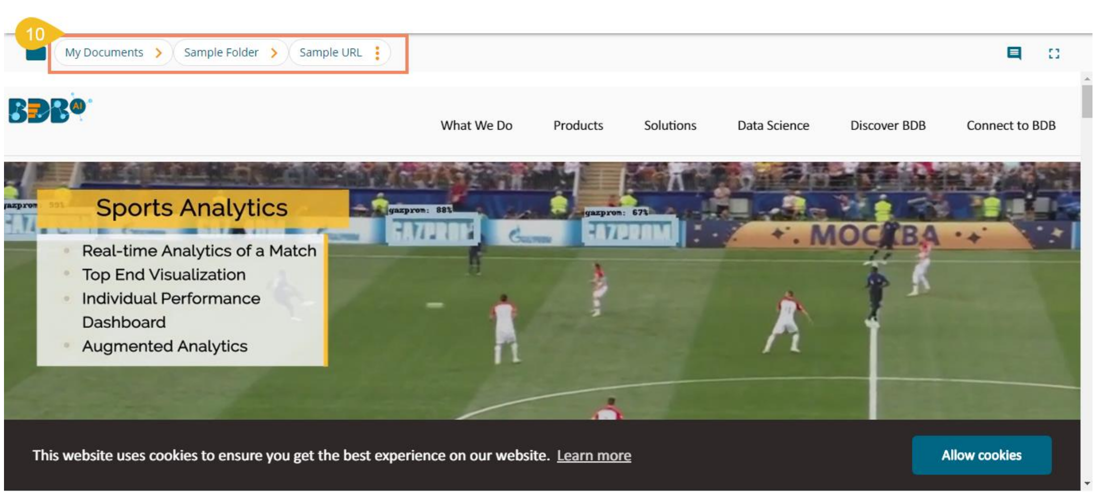
v) Describe the URL (optional).
vi) Navigate to the ‘**URL Parameter**’ tab to add parameters (Optional).
vii) Click the ‘**Save**’ option.



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



x) The user can see the linked URL by opening the created sample URL.



7.1.6.1. Adding or Removing a URL Parameter:

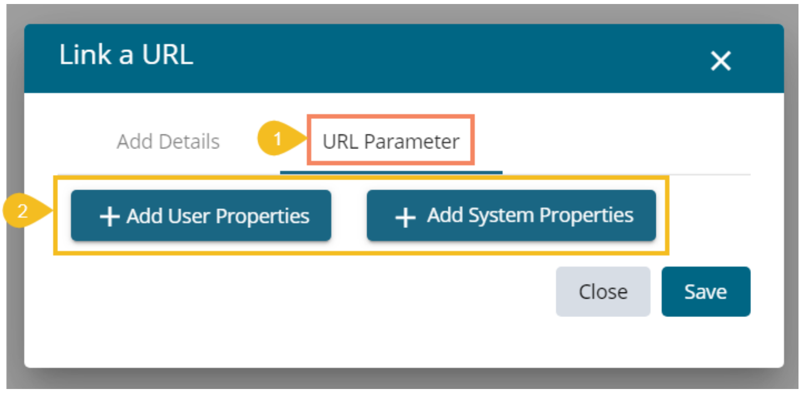
The user can add or remove parameters to the linked URL by using this option.

i) Navigate to the '**URL Parameter**' tab.

ii) Two options for adding URL properties get displayed

  a. Add User Properties

  b. Add System Properties



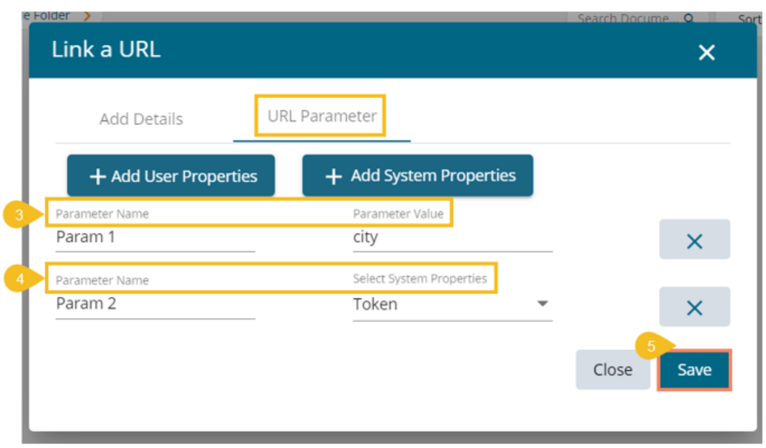
iii) By clicking the '**Add User Properties**' option, the user requires to add Parameter Name and Parameter Values.

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).

  b. By choosing the '**System Properties**' option, it requires the administrator to select an option from the available system properties drop-down menu. (E.g., in the below given image, parameter '**Param 2**' passes the authentication '**Token**' as system properties to link the URL).

v) Click the '**Save**' option to save the information.



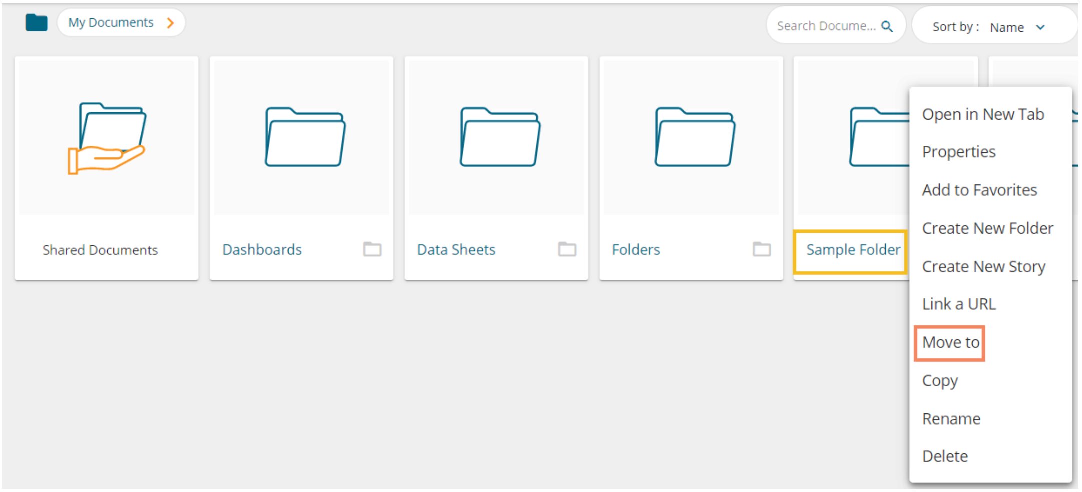
Note:

a. The user can easily connect internal URL links by using the parameters, while the external URLs require security permission to link.

b. The user can click the '**Remove**' option provided next to an added parameter to remove the parameter.

7.1.7. Moving a Folder

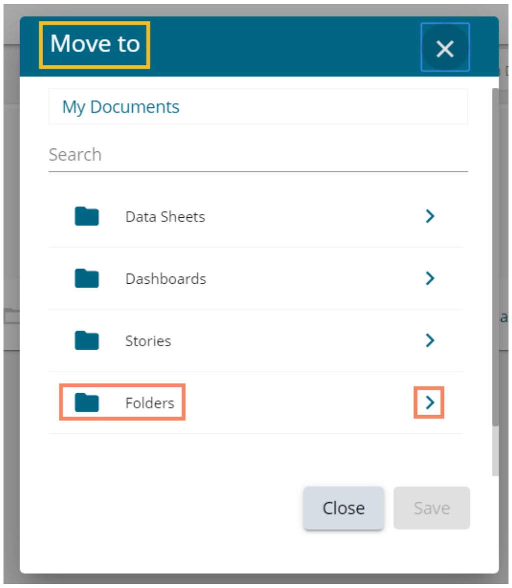
i) Select the ‘**Move to**’ option from the Folder context menu.



ii) The ‘**Move to**’ window appears displaying the available folders.

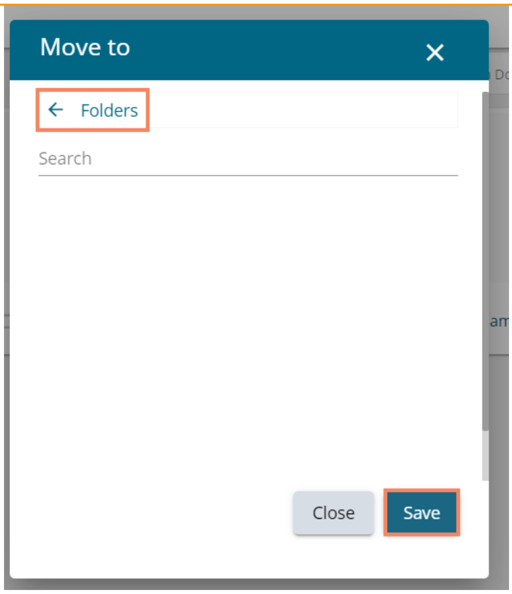
iii) Select a folder.

iv) Click the ‘**Move**’ > icon.

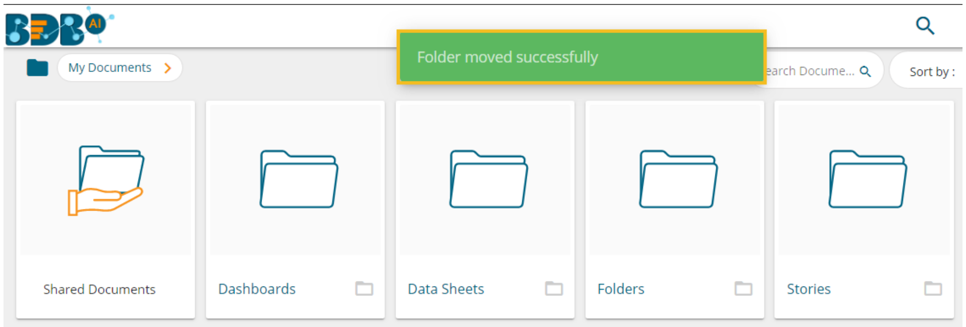


v) A new window opens displaying the available folders inside the selected folder.

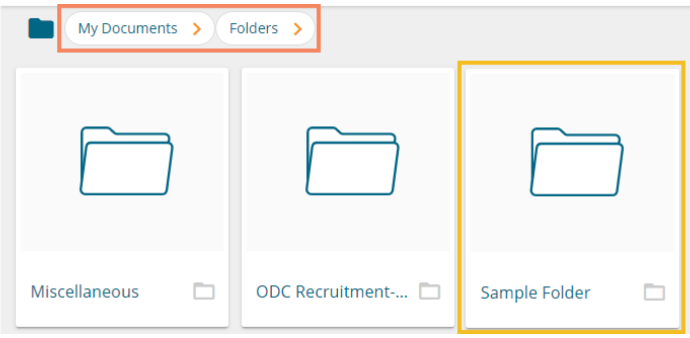
vi) Click the ‘**Save**’ option.



vii) A success message appears.



viii) The folder gets moved to the targeted folder.

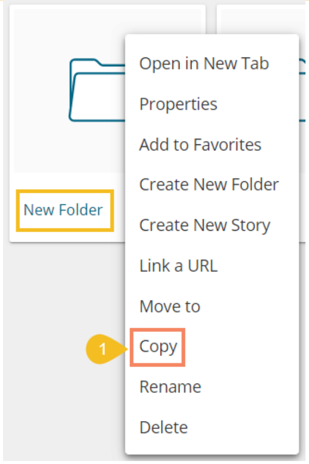


Note: The '**Move To**' option is not available to the folders shared as the Public Documents.

7.1.8. Copying a Folder

The system user can copy a folder and paste it to a different folder.

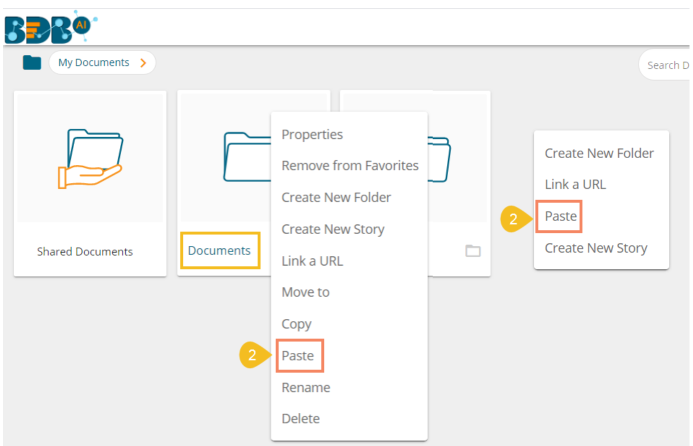
i) Select the '**Copy**' option from the context menu.



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

OR

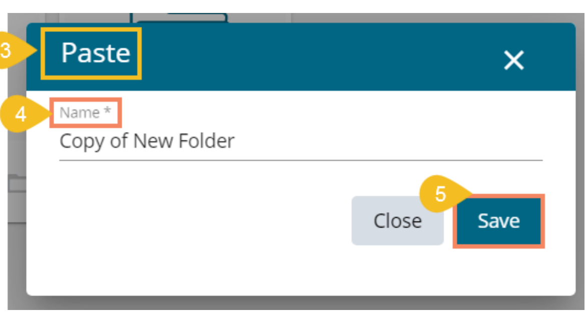
Navigate to '**My Documents**' or '**Public Documents**' and right-click anywhere on the blank space to get the '**Paste**' option. Click the '**Paste**' option.



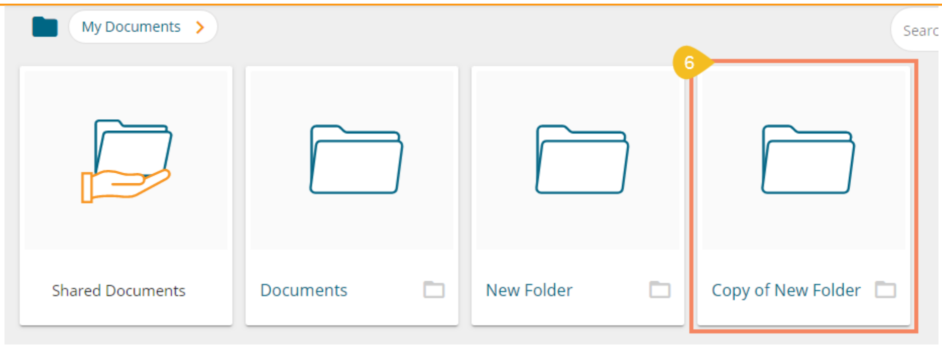
iii) The '**Paste**' window appears.

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.



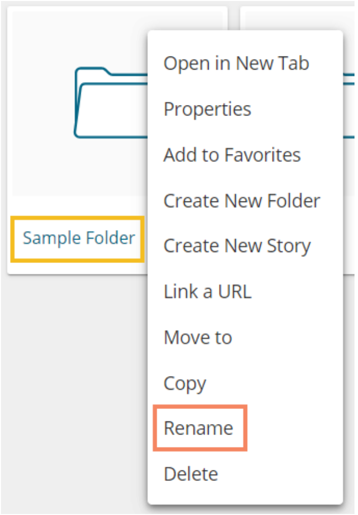
vi) The copied folder gets pasted successfully with a different name.
E.g., The following image shows that a folder '**New Folder**' from '**My Documents**' is named *Copy of New Folder* and has been pasted in the same document space.



7.1.9. Renaming a Folder

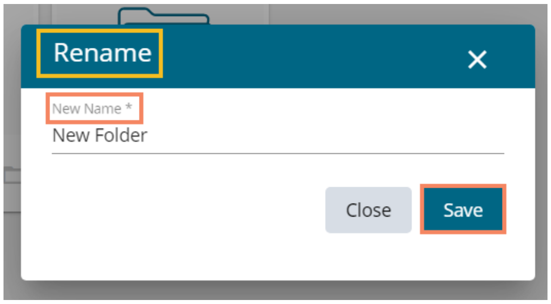
i) Select the '**Rename**' option from the Folder context menu.

ii) The Rename window opens.



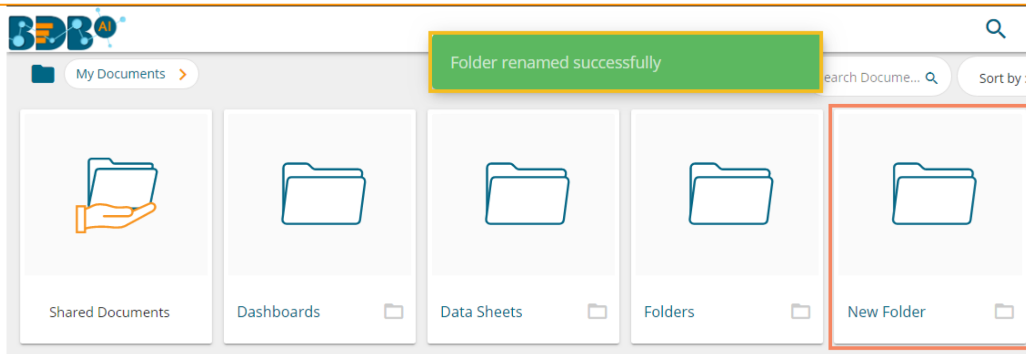
iii) Enter a **New Name** for the folder.

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



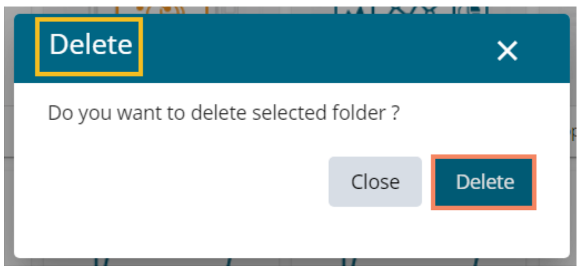
v) A success message appears.

vi) The folder gets renamed.

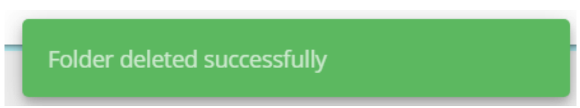


7.1.10. Deleting a Folder

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.



iv) A success message appears to confirm the action.



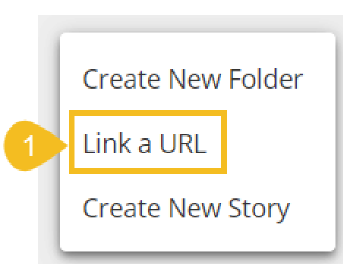
v) The selected folder gets removed from the platform.

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

7.2. Linking a URL

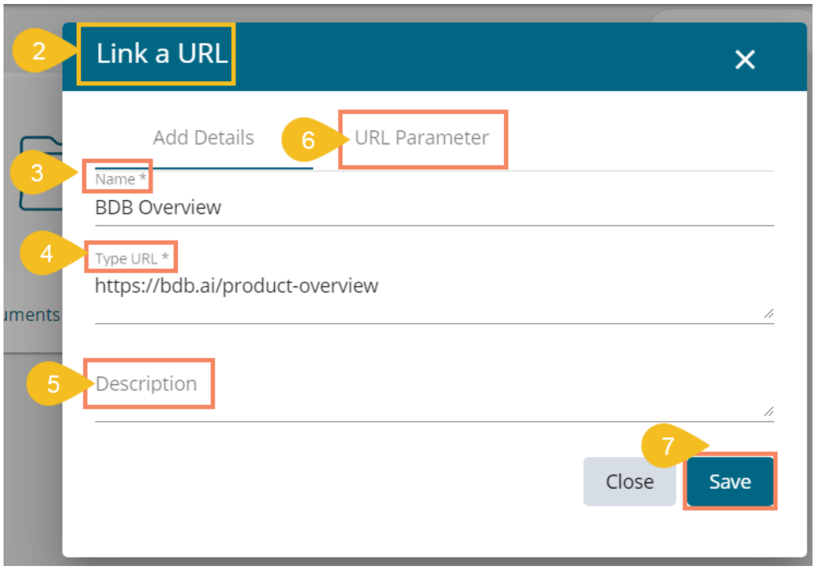
The user can connect to the URLs with the chosen folders or to the selected Document space.

i) Select the '**Link a URL**' option from the Options context menu.

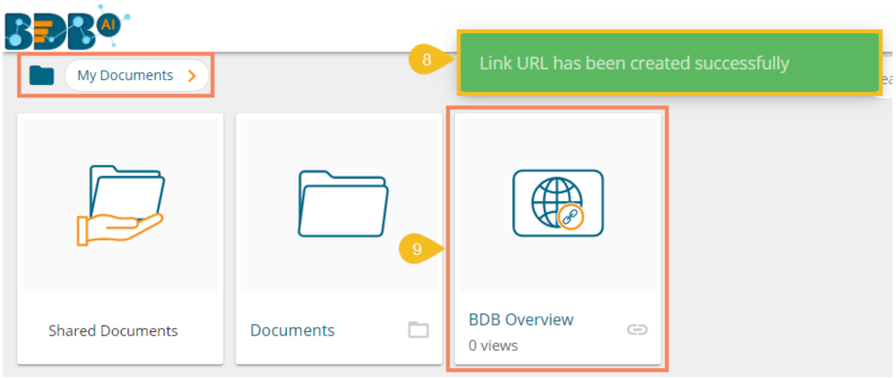


ii) The Link a URL window opens displaying the '**Add Details**' tab.
iii) Enter a name for the URL.

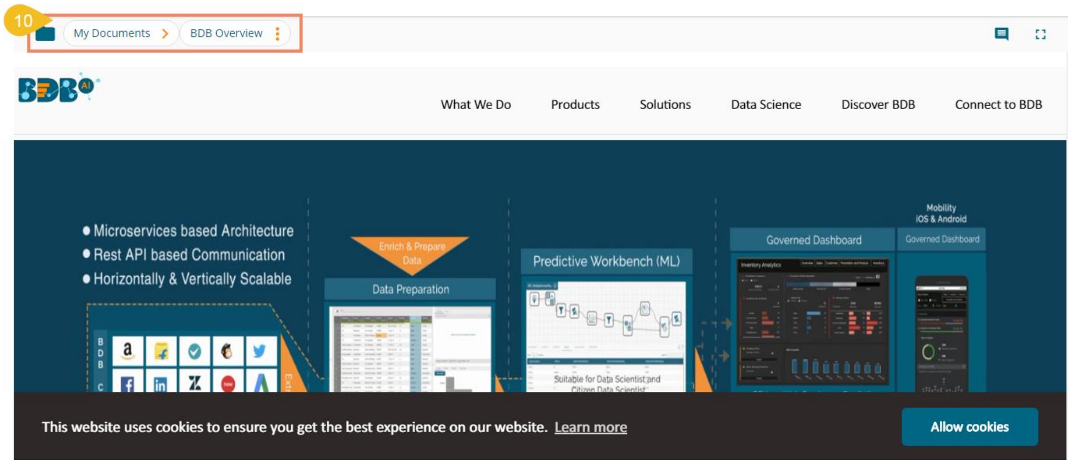
iv) Provide the URL link that you wish to add in the '**Type URL**' field.
v) Describe the URL (optional).
vi) Navigate to the '**URL Parameter**' tab to add parameters (Optional).
vii) Click the '**Save**' option.



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



x) The user can see the linked URL by opening the created sample URL.

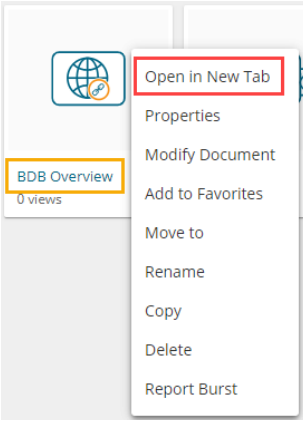


- **Operations Assigned to a URL**

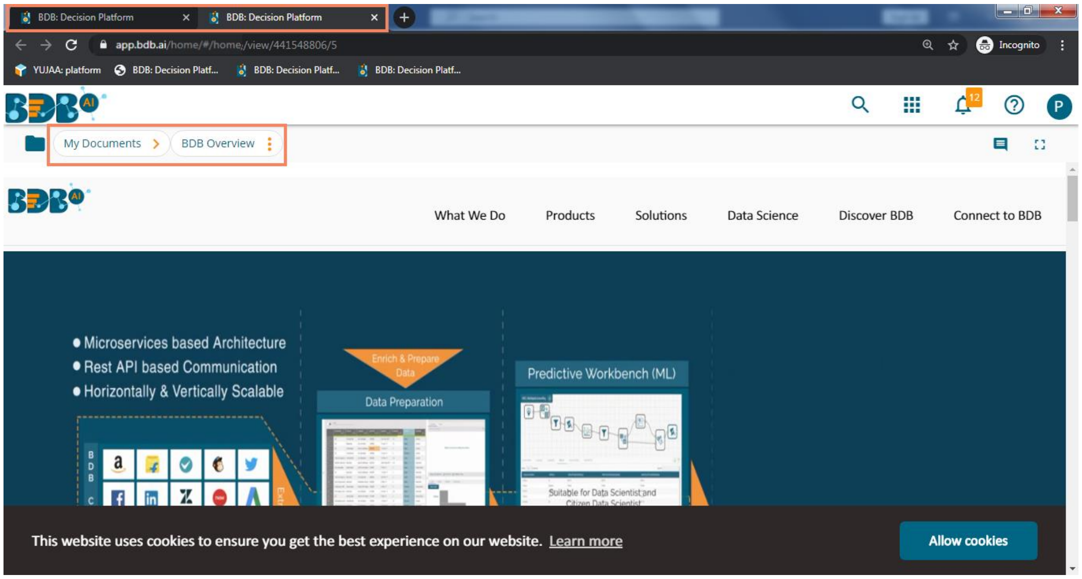
7.2.1. Open in New Tab

i) Select a linked URL document.

ii) Select the '**Open in New Tab**' option from the context menu.



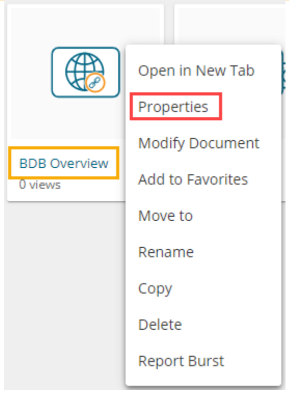
iii) The concerned document with the linked URL gets opened in a new tab.



7.2.2. Properties

i) Select a linked URL document.

ii) Select the '**Properties**' option from the context menu.

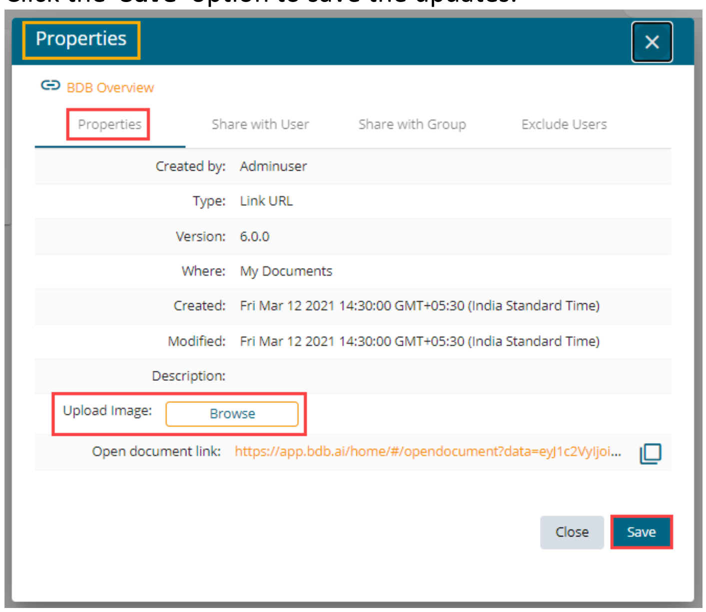


iii) The ‘**Properties**’ window appears with four options.

a. **Properties:** Properties tab of the linked URL document gets displayed.

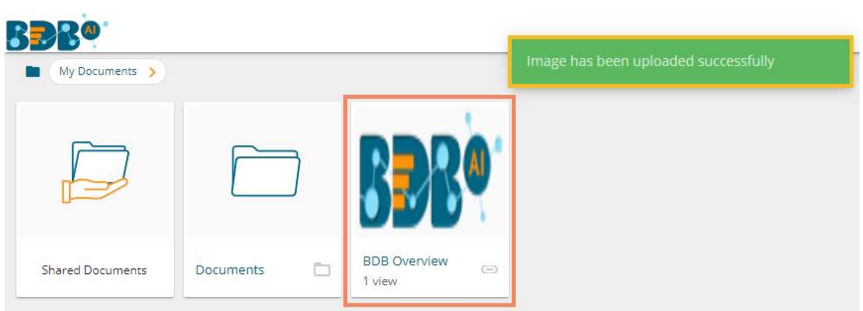
i. Click the ‘**Browse**’ option to upload an image (A success message appears after the image gets uploaded).

ii. Click the ‘**Save**’ option to save the updates.

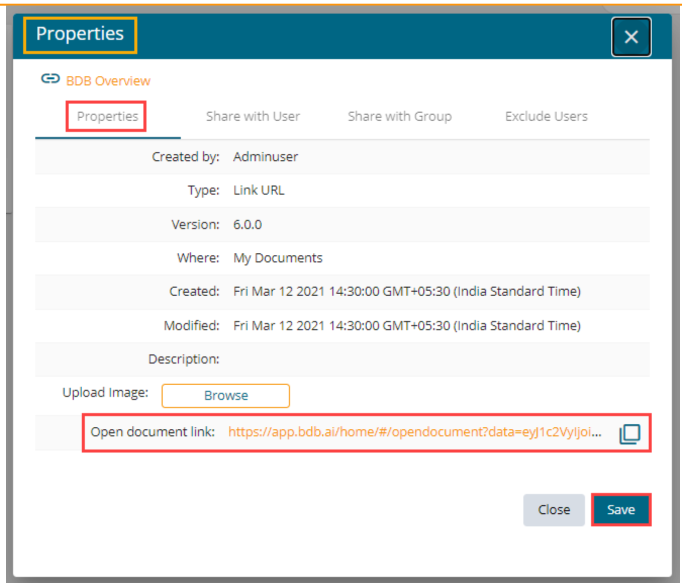


iii. A success message appears after uploading the image.

iv. The image gets uploaded.

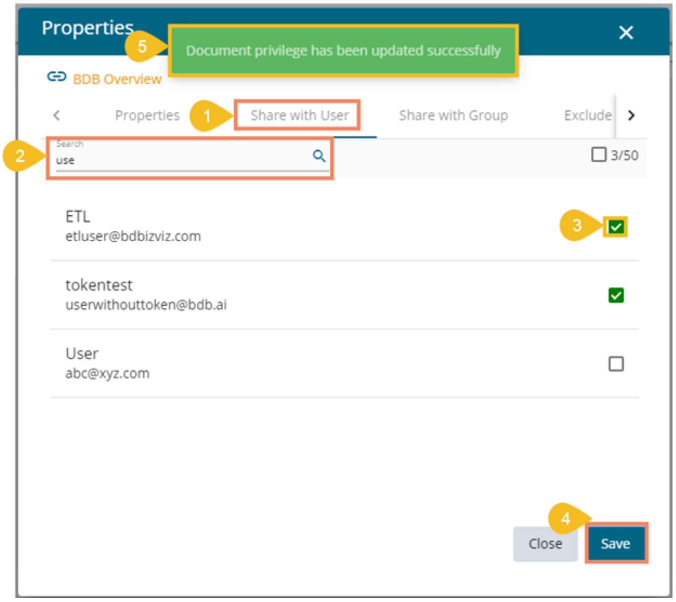


Note: Click the ‘**Copy Link**’ icon to copy the open document link of the Link URL. The copied Open link can be pasted to the desired place.



b. Share with User: The linked URL document is shared with the selected user(s).

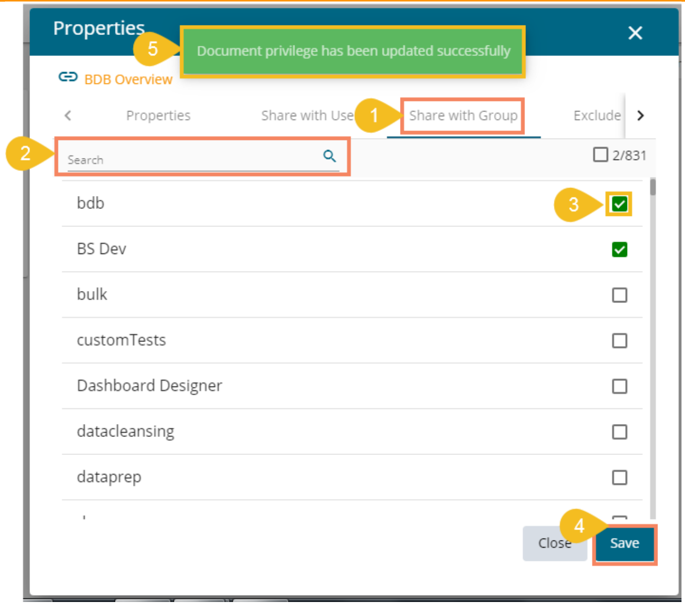
1. Select the '**Share with User'** on the Properties window.
2. Search a specific user by using the search bar.
3. Select a user or all the users by using the checkmarks in the given box(es).
4. Click the '**Save**' option.
5. A success message appears stating that the document privilege is updated.



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.

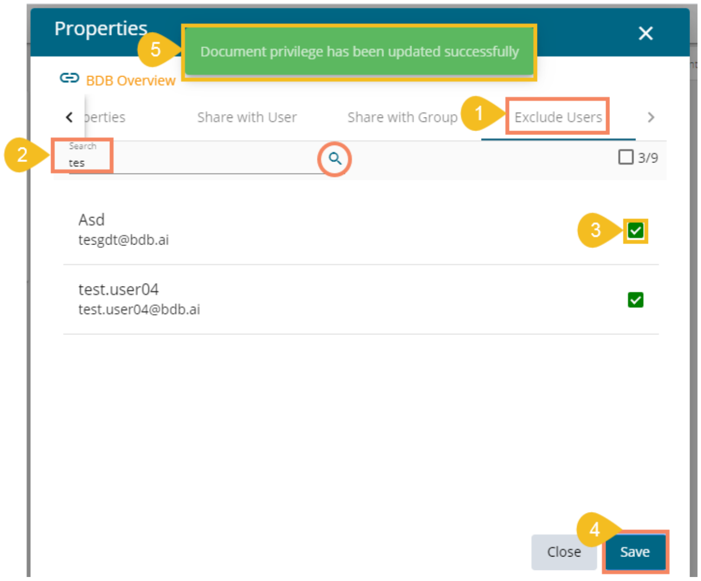


6. The document gets shared with the selected group(s).

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.

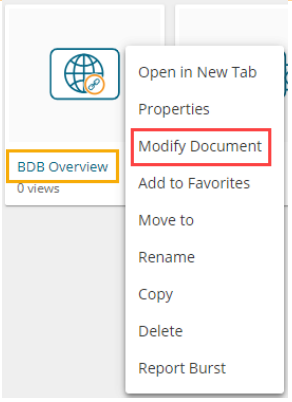
d. Exclude User: The selected user cannot access the linked URL file.

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.

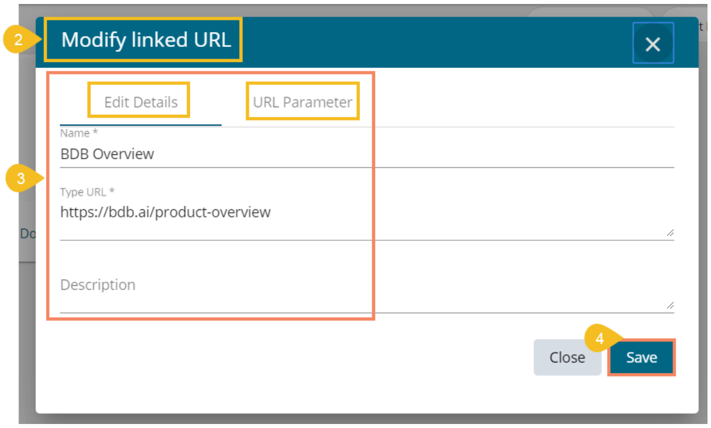


ii) The Modify Linked URL window opens.

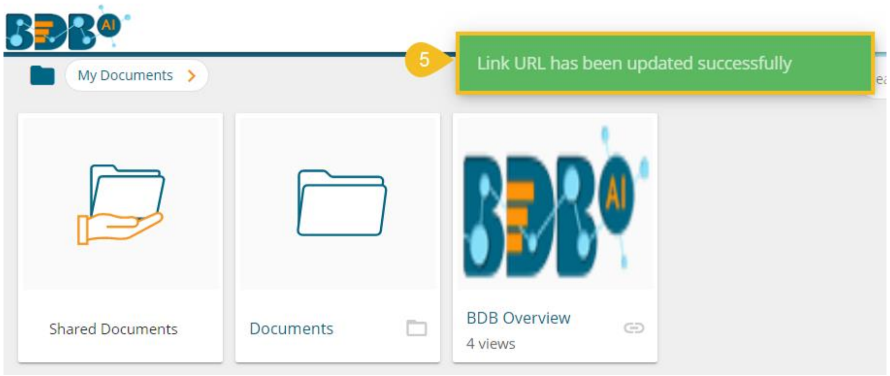
iii) The user can modify the following information (if required).

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.



v) A success message appears to inform the user that the selected URL has been updated.

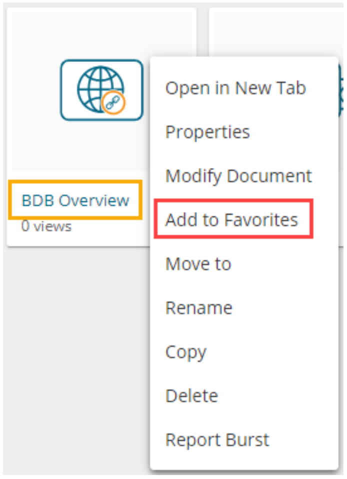


7.2.4. Adding/Removing a URL Document to/from Favorites

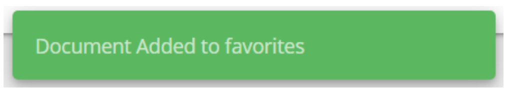
The user can add a URL document to or remove it from the '**Favorites**' section.

i) Select a linked URL document.

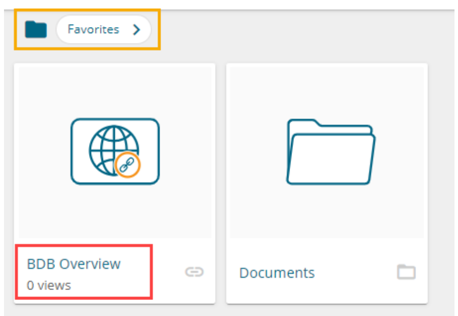
ii) Select the '**Add to Favorites**' option from the context menu.



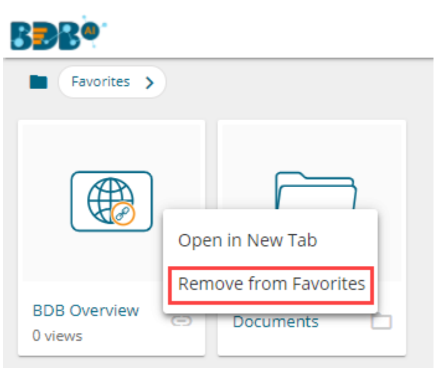
iii) A message, "**Document added to Favorites**" appears.



iv) The selected link URL gets added to the '**Favorites**' section.



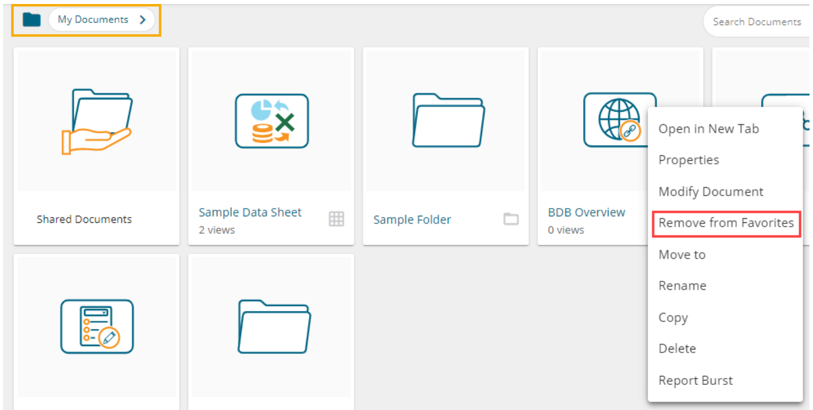
v) Navigate to the link URL you wish to remove from the '**Favorites**' section.
vi) Use right-click on the URL to get the remove option.
vii) Click the '**Remove from Favorites**' option.



OR

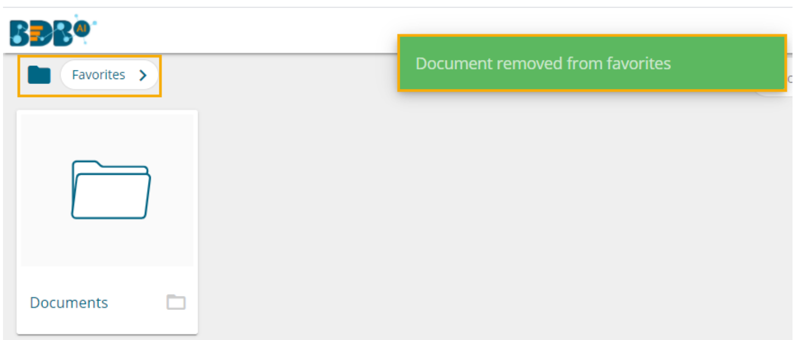
Navigate to the original URL document and use the right-click to open the context menu. The '**Remove from Favorites**' option appears.

Click the ‘**Remove from Favorites**’ option.



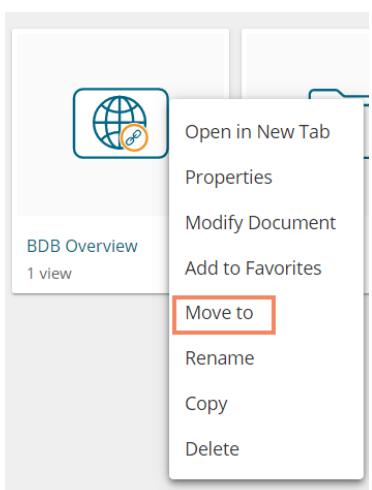
viii) A message appears stating, “**Document removed from Favorites”** and the selected document with linked URL gets removed.

ix) The URL file gets removed from the ‘**Favorites**’ section.



7.2.5. Moving a URL File

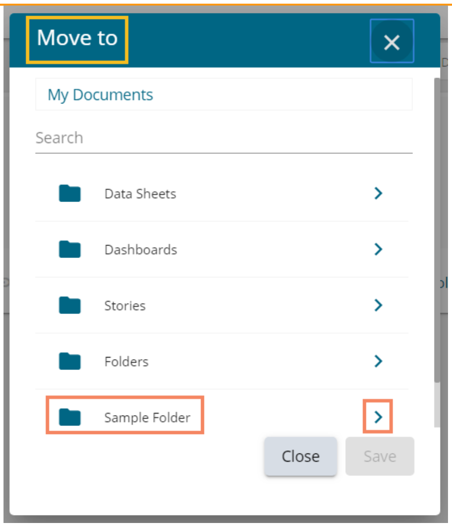
i) Select the ‘**Move to**’ option from the URL context menu.



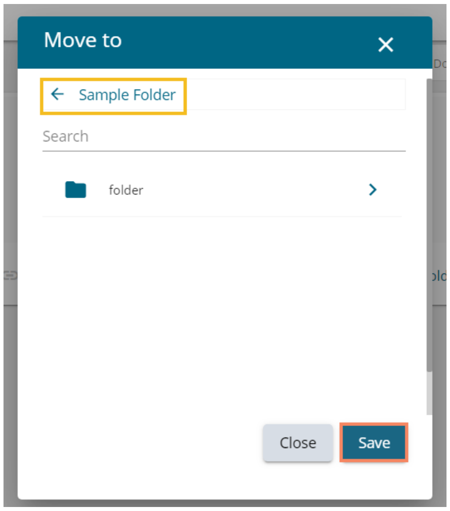
ii) The ‘**Move to**’ window appears displaying the available folders.

iii) Select a folder.

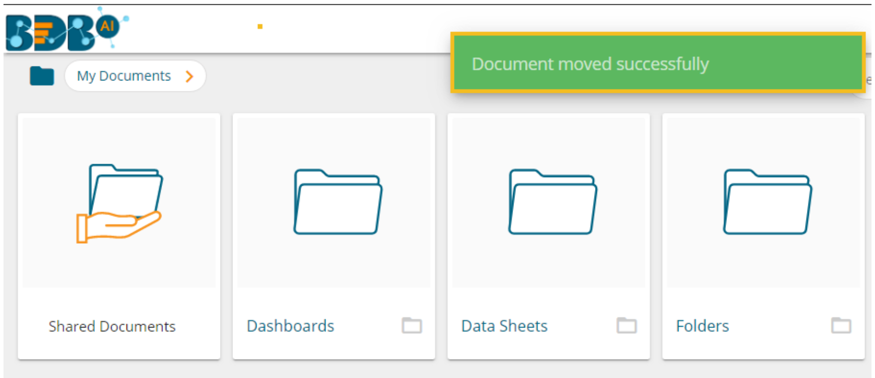
iv) Click the ‘**Move**’ > icon.



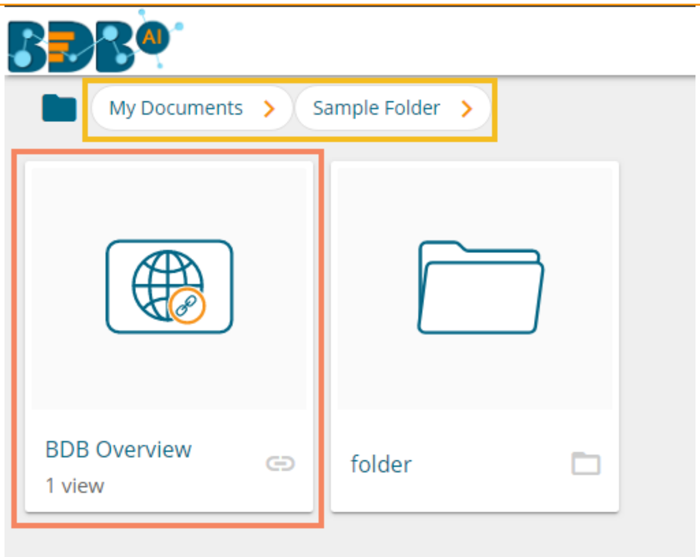
v) The user gets redirected to the next screen with the selected folder displayed on the top.
vi) Click the '**Save**' option.



vii) A message appears to notify the user that the concerned document has been moved.

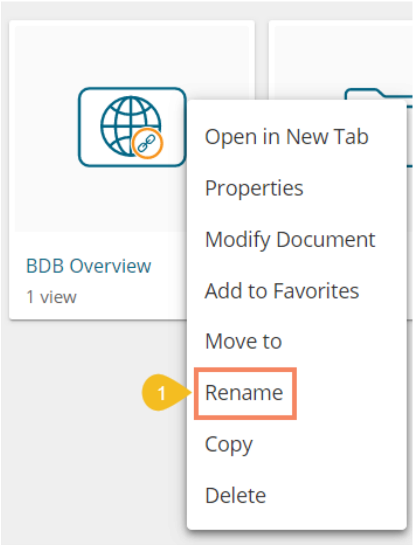


viii) The concerned document with a linked URL gets moved to the selected space.



7.2.6. Renaming a URL Document

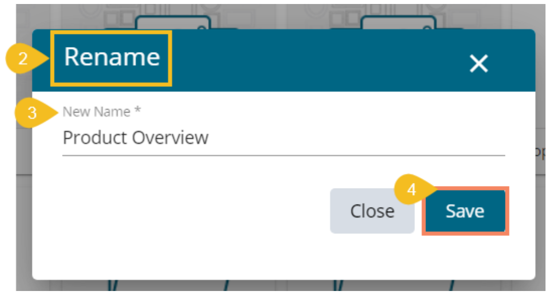
i) Select the '**Rename**' option from the URL Options menu.



ii) The Rename window opens.

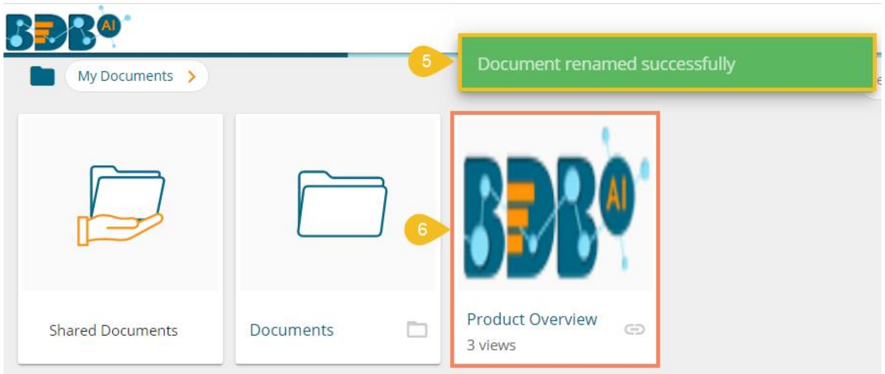
iii) Enter a New Name for the URL document.

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



v) A success message appears.

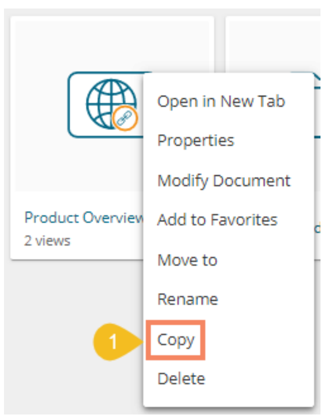
vi) The linked URL document gets renamed.



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.



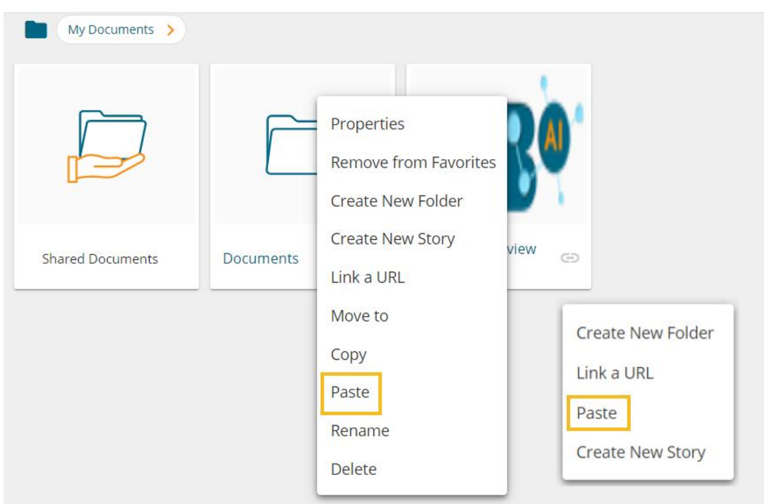
ii) Select another folder and use the right-click.

Or

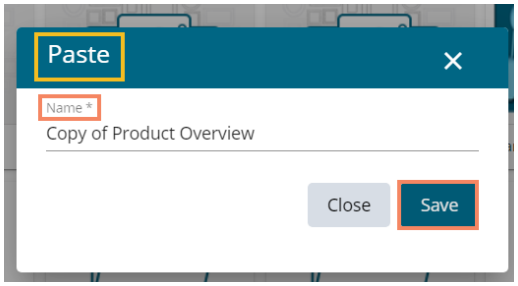
Navigate to ‘**My Documents**’ or ‘**Public Documents**’ and use right-click on the blank space.

iii) A context menu appears with the ‘**Paste**’ option.

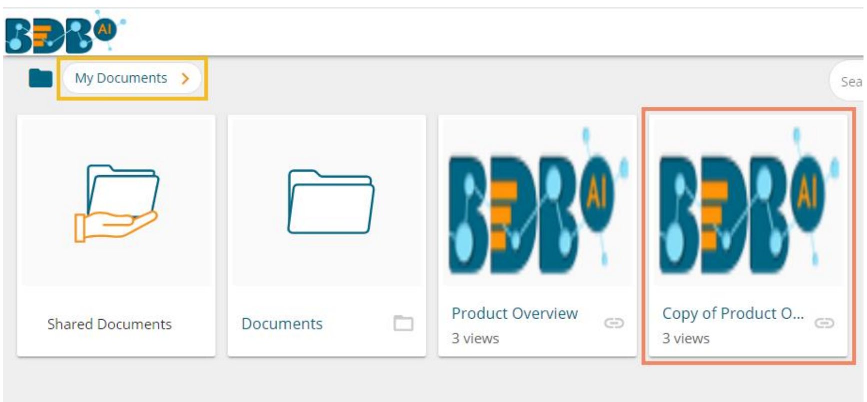
iv) Select the ‘**Paste**’ option.



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.

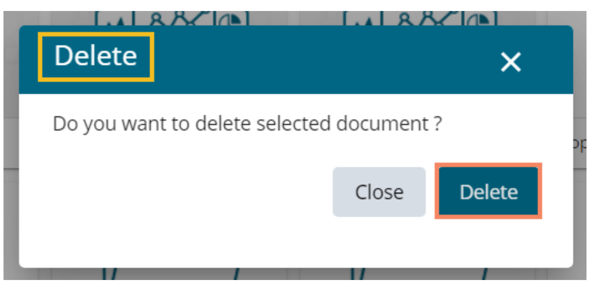


viii) A success message appears.
ix) The copied link URL gets replicated with a different name.



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.



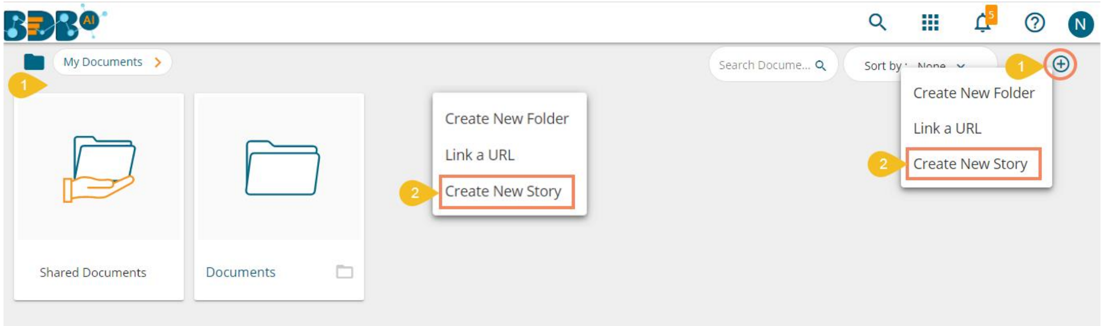
iv) The selected URL file gets removed.

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.

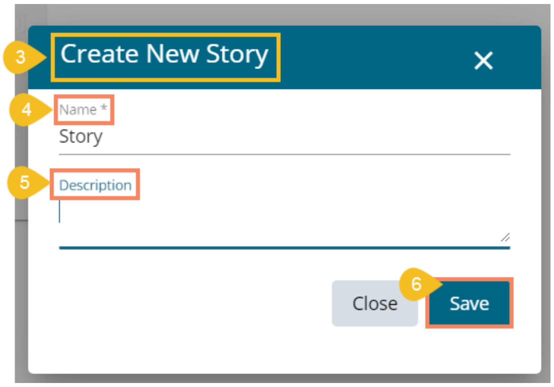


iii) The '**Create New Story**' window opens.

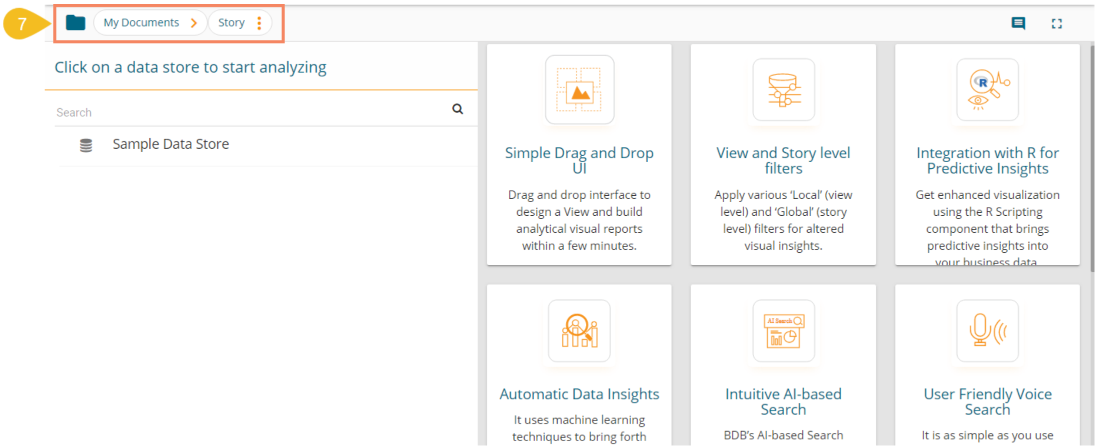
iv) Enter a title for the story document.

v) Describe the story document (optional).

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

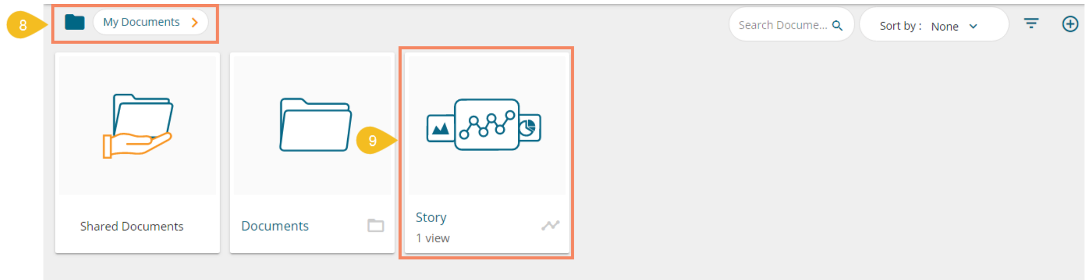


vii) The story document gets created, and the following page opens by default.



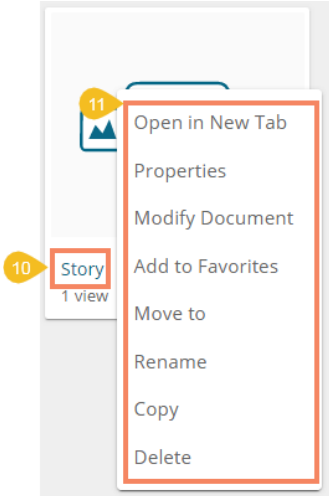
viii) Navigate back to space where the story document creation was intended (i.e., Navigate to '**My Documents**' space).

ix) The newly created Story document gets added to space.



x) Select an existing story document.

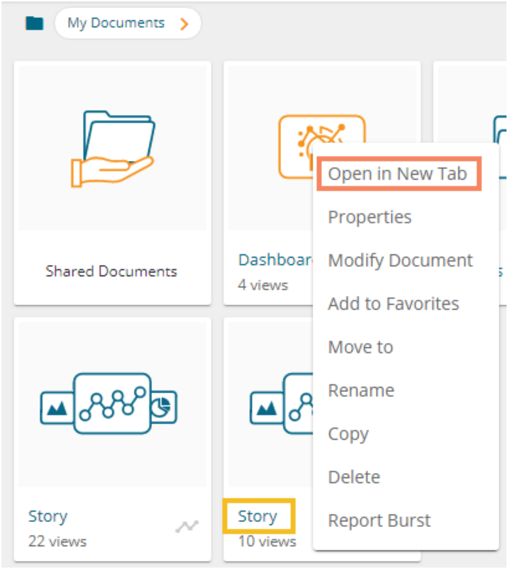
xi) Use the right-click on it to get the credited operations for a story in a context menu.



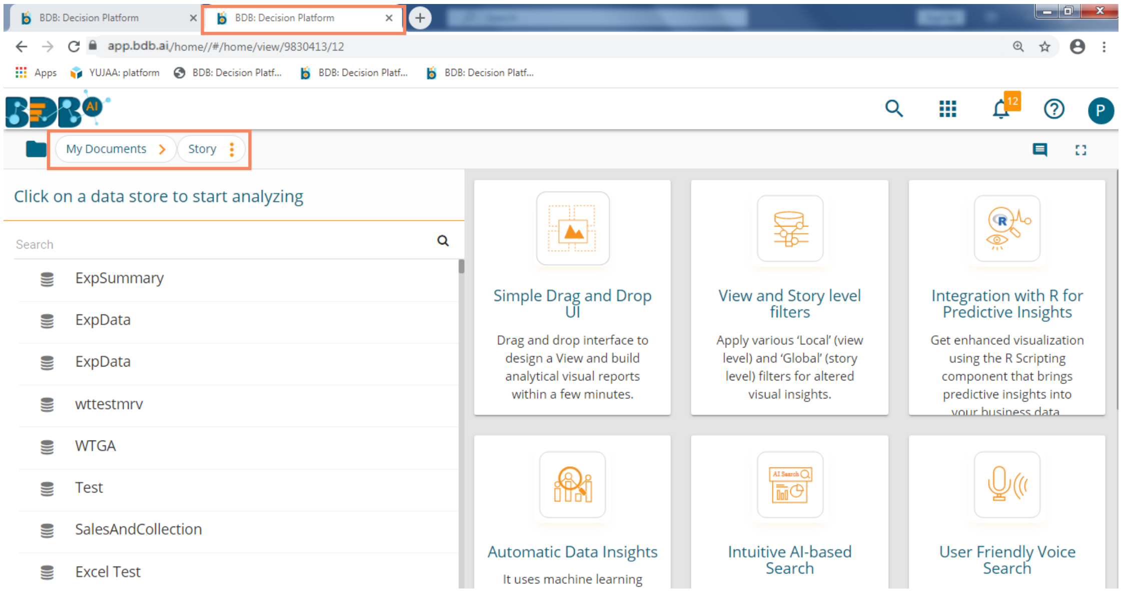
7.3.1. Open in New Tab

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.



7.3.2. Properties

i) Select the '**Properties**' option from the Options menu.

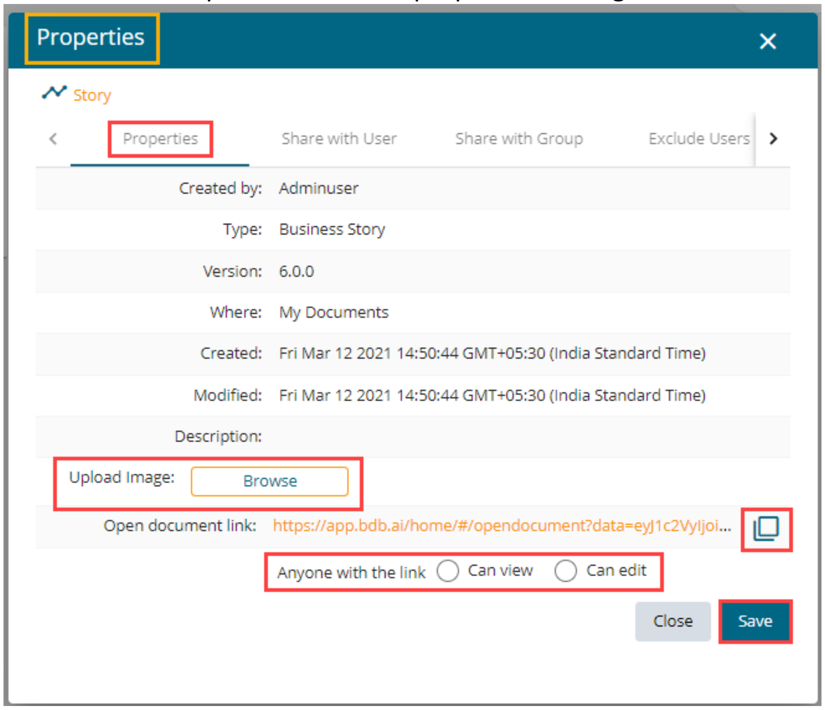
ii) A new screen pops-up with four options:

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.

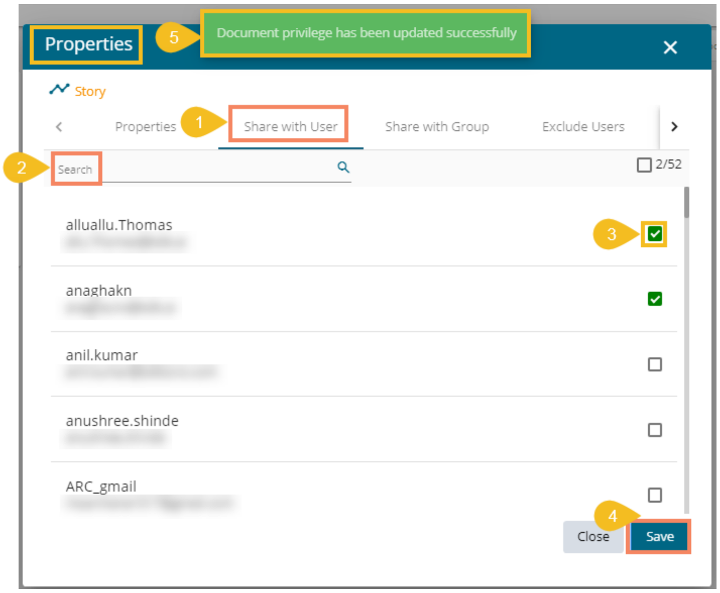
iii) Click the '**Save**' option to save the properties settings.



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.

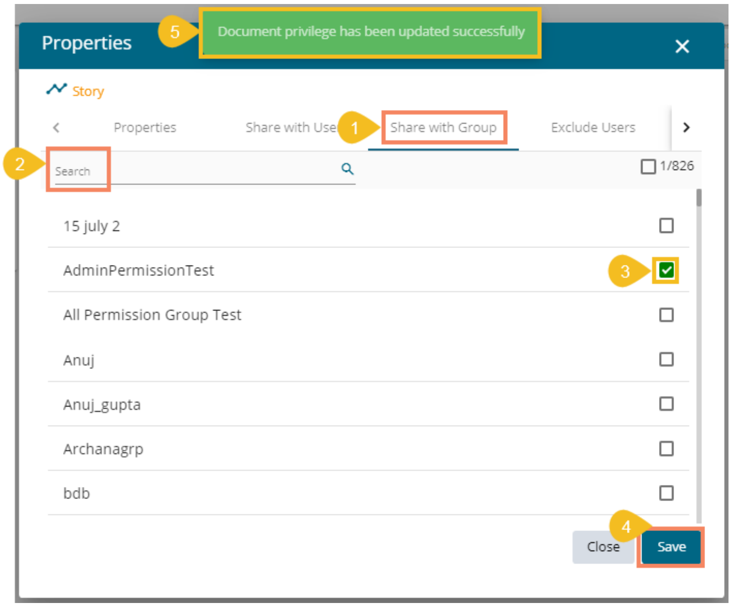
1. Select the '**Share with User**' tab.
2. Search for a specific user(s) using the search bar.
3. Select a user or multiple users by using the tick marks in the given box(es).
4. Click the '**Save**' option.
5. A success message appears, "Document privilege has been updated successfully".



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."

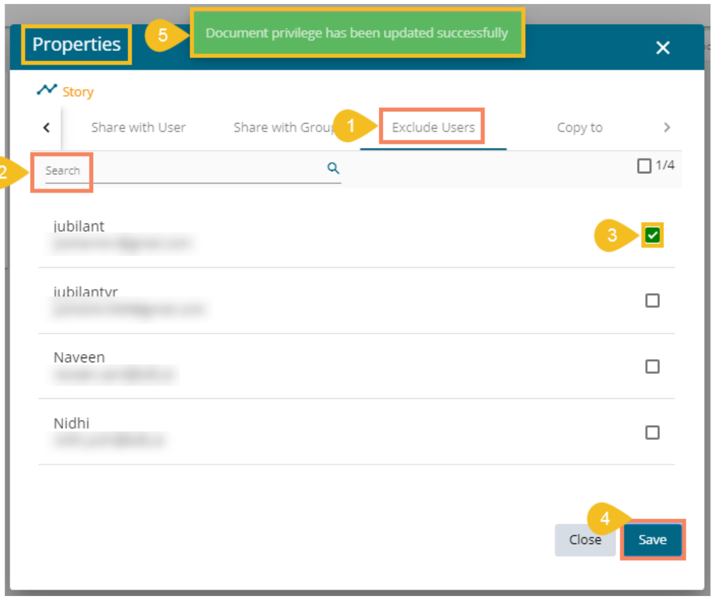


6. The story document gets shared with the selected user group or user groups.

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.

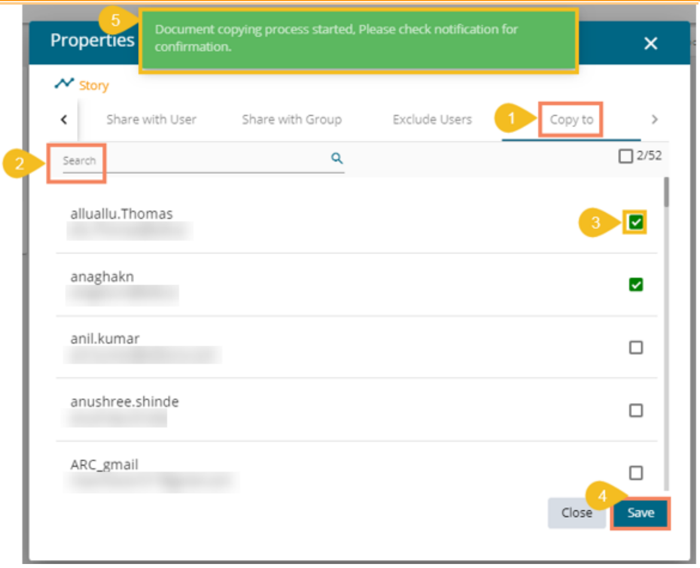
1. Select the '**Exclude Users**' tab.
2. Search for the specific user via the Search bar.
3. Select a user or users by using checkmark(s) in the given box.
4. Click the '**Save**' option.
5. A success message appears, "Document privilege has been updated successfully."



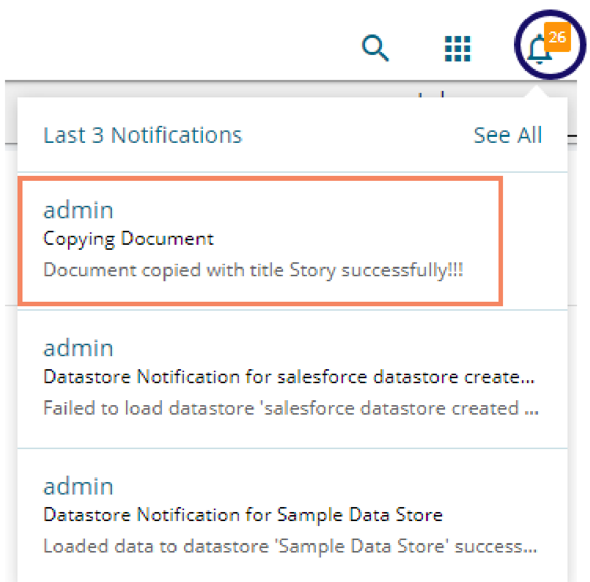
6. The selected user or users get excluded from the rights to access the concerned story document.

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.**"



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.



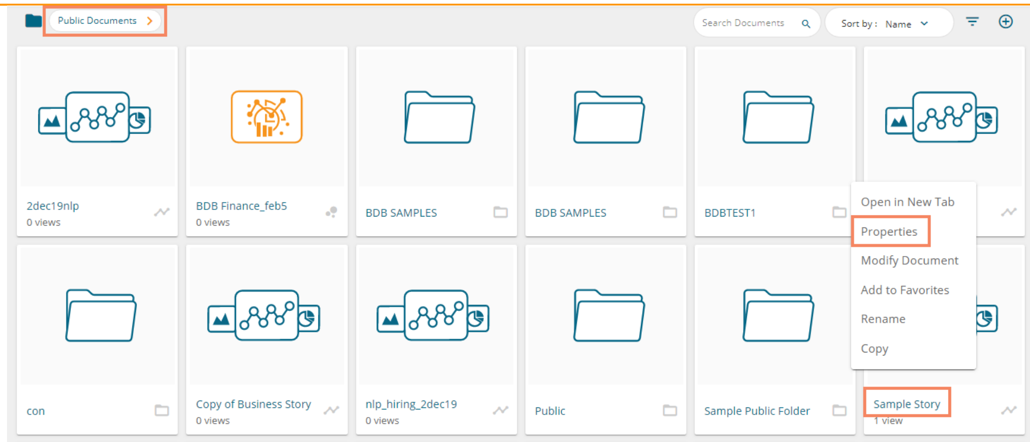
7. A copy of the story document gets shared with the selected user or users.

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.

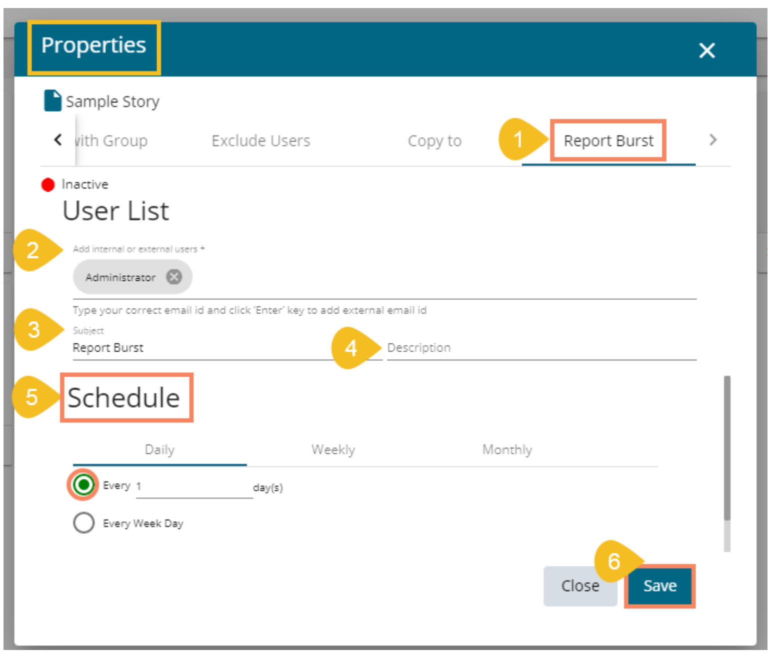
7.3.2.1. Report Burst

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.

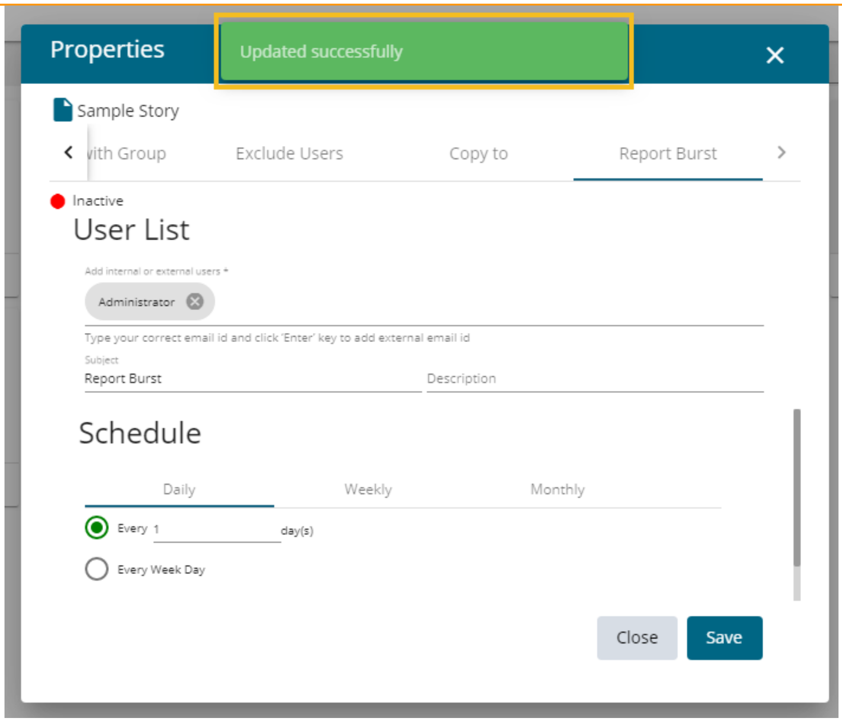
i) Navigate to the '**Public Documents**' documents space.
ii) Select a Story document and open the context menu with the available operations.
iii) Click the '**Properties**' option.



iv) A new window opens with multiple tabs.
v) Select the '**Report Burst**' tab.
vi) Add an external or internal user(s).
vii) Provide Subject.
viii) Provide Description.
ix) Schedule the selected story document by configuring the time range.
x) Click the '**Save**' option.

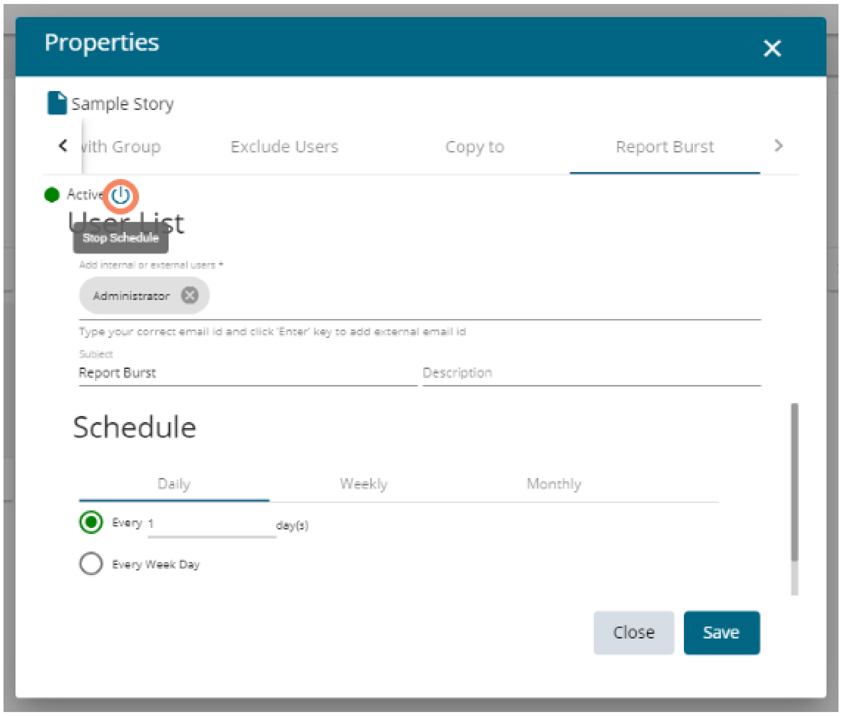


xi) A success message appears.



xii) The Scheduler status becomes active.

xiii) Click the '**Stop Schedule**' button to stop the scheduler.

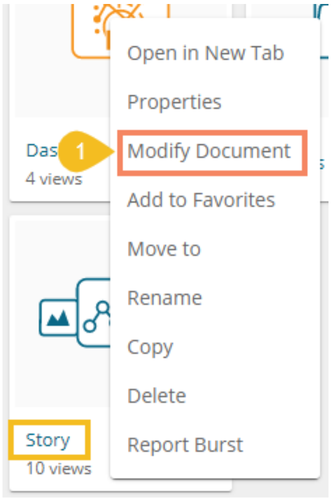


xiv) A notification message appears to inform the same.

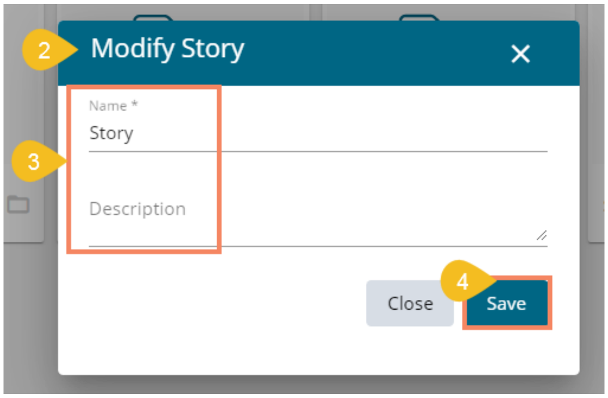
xv) The open doc link of the selected story gets shared to the selected user at the scheduled time through the mail.

7.3.3. Modifying a Document

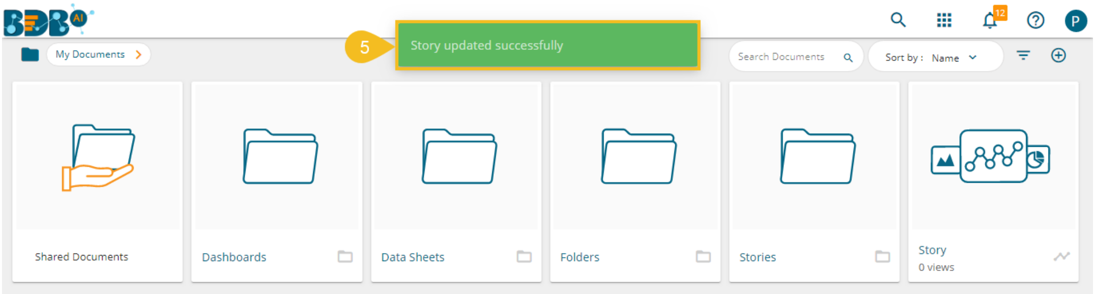
i) Select the '**Modify Document**' option from the Story Operations menu.



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.



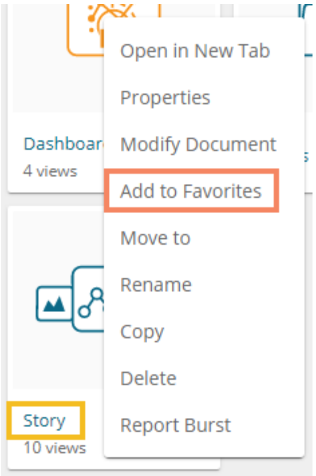
v) A confirmation message appears and the chosen information for the story gets modified.



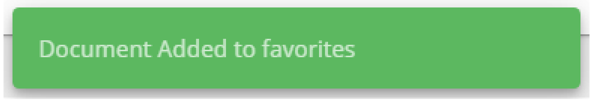
7.3.4. Adding/Removing a Story Document to/from Favorites

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

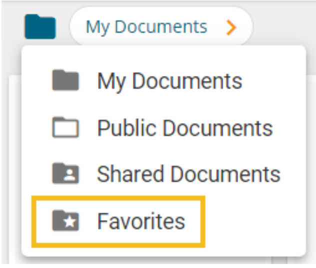
i) Select the '**Add to Favorites**' option from the Operations menu.



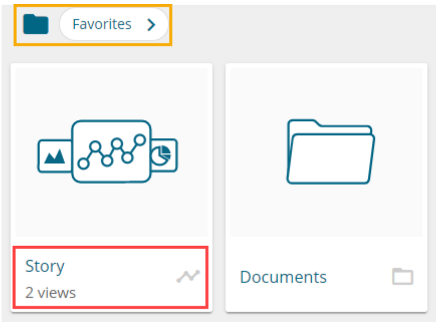
ii) A new message pops-up, "Document added to Favorites."



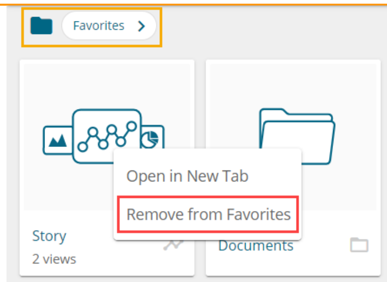
iii) Open the '**Favorites**' document using the '**My Documents**' drop-down menu.



iv) The selected Data Sheet document gets added to the '**Favorites**' space.

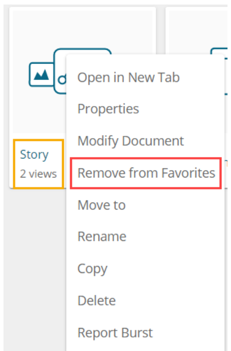


v) Click the '**Remove from Favorites**' option that appears by using a right-click on the story document under the Favorites.



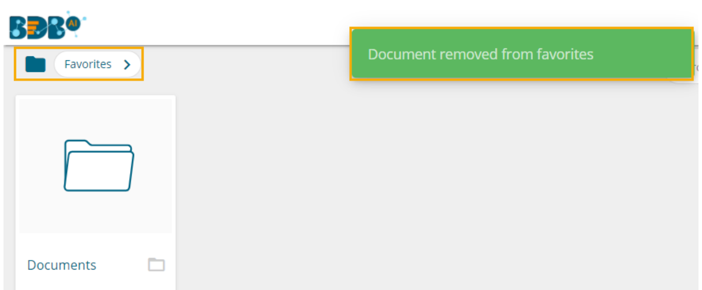
OR

Navigate to the original Story document and use right-click on it to get the '**Remove from Favorites**' option.



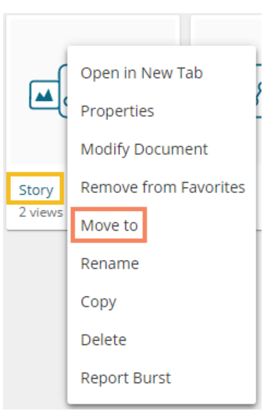
vi) A confirmation message appears.

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

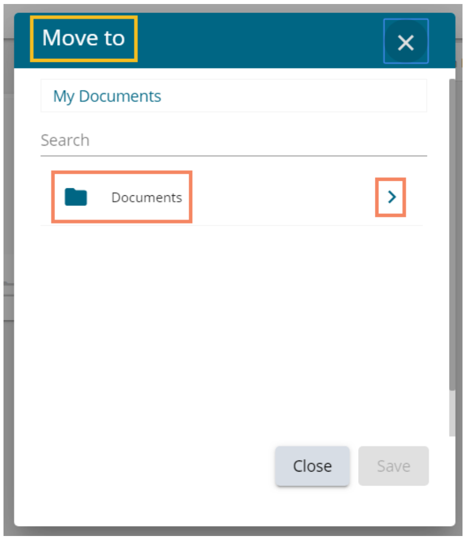


7.3.5. Move to

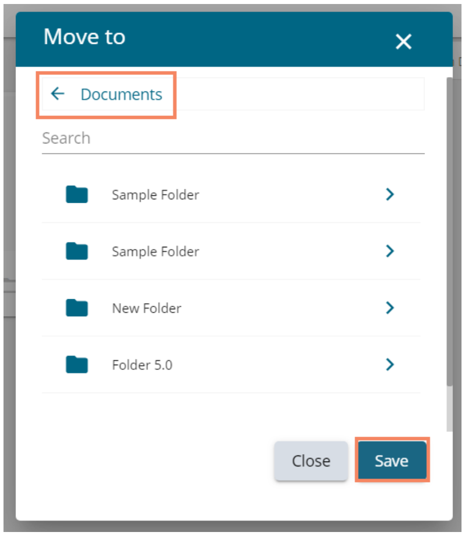
i) Select the '**Move to**' option from the Story Options menu.



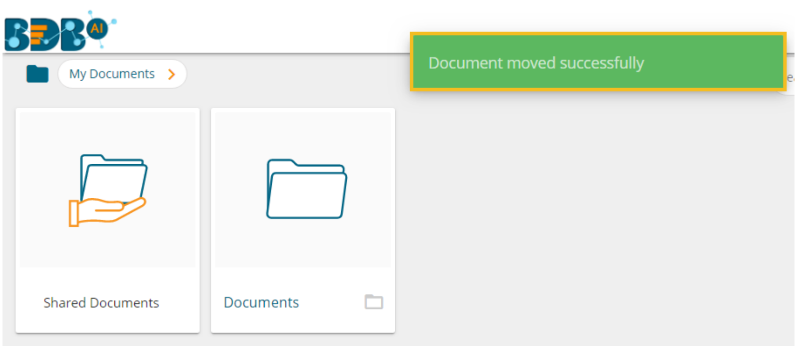
ii) A new screen opens with the available folder options.
iii) Select a folder or subfolder.
iv) Click on the '**Move**' option to open a list of available sub-folders.



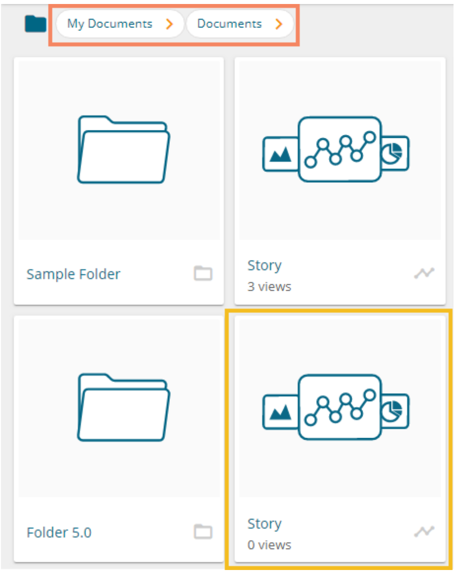
v) A new window opens with the selected Folder mentioned on the top.
vi) Click the '**Save**' option.



vii) A success message appears.

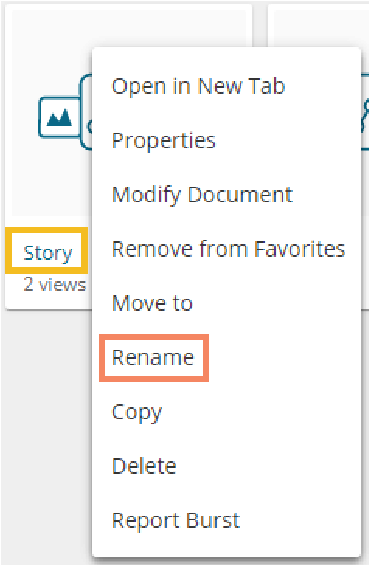


viii) The concerned story gets moved to the selected folder or subfolder.



7.3.6. Renaming a Story Document

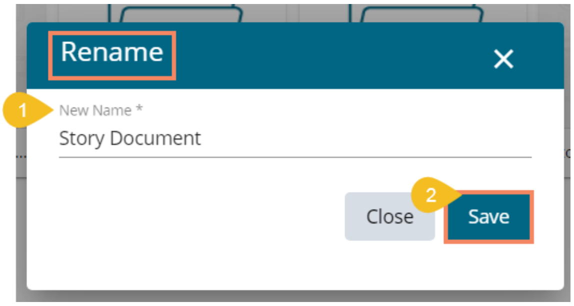
i) Select the '**Rename**' option from the Operations menu.



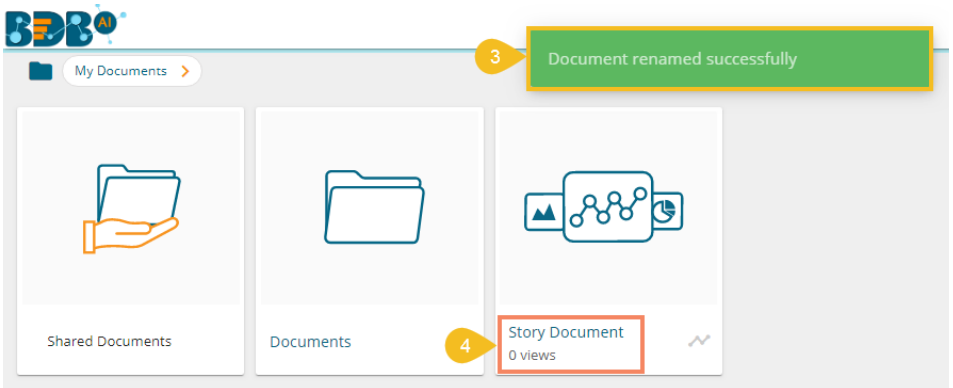
ii) Configure the following information to rename the story.

a. Enter '**New Name**' in the story document.

b. Click the '**Save**' option.



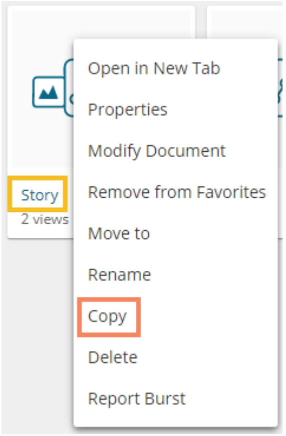
iii) A confirmation message appears.
iv) The story document gets renamed successfully.



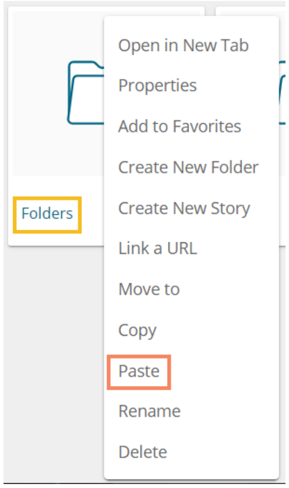
7.3.7. Copying and Moving a Business Story

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.



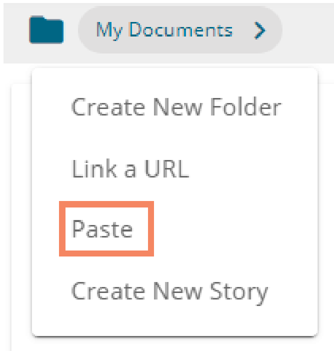
ii) Select another folder and use right-click to get the '**Paste**' option.



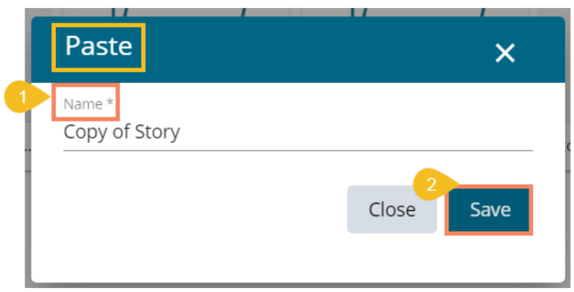
Or

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

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

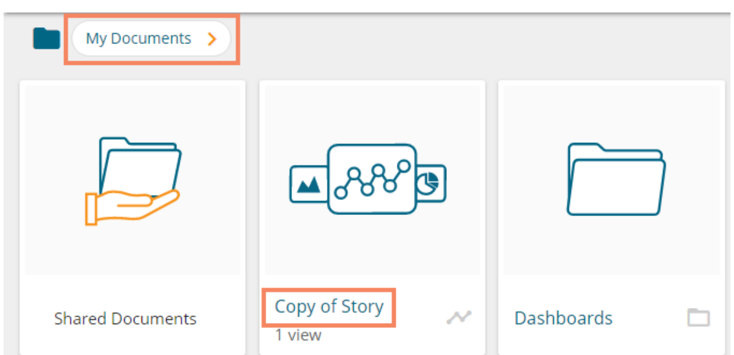


v) The '**Paste**' window appears
   a. The **'Name'** field displays the prefix '**Copy of-**' before the original name of the story document (E.g., *Story g*ets a new name *Copy of Story*).
   b. Click the '**Save**' option.



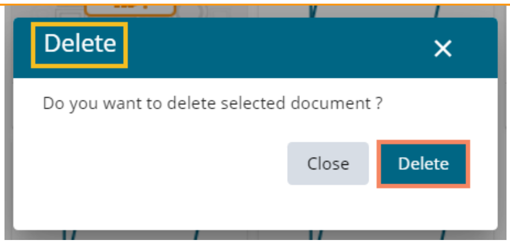
vi) The copied story document gets pasted successfully with a different name in the given space.

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

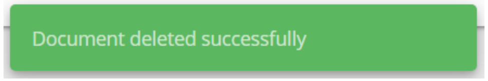


7.3.8. Deleting a Business Story

i) Select the '**Delete**' option from the Operations menu.
ii) A new window opens, assuring the deletion.
iii) Click the '**Delete**' option.



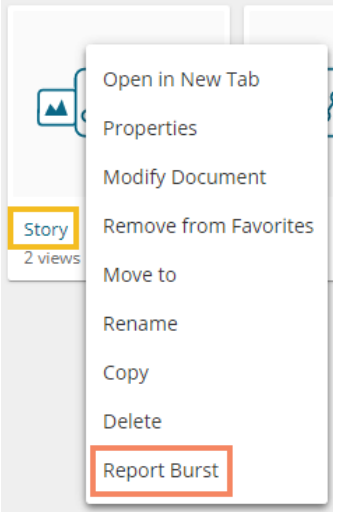
iv) A success message appears.



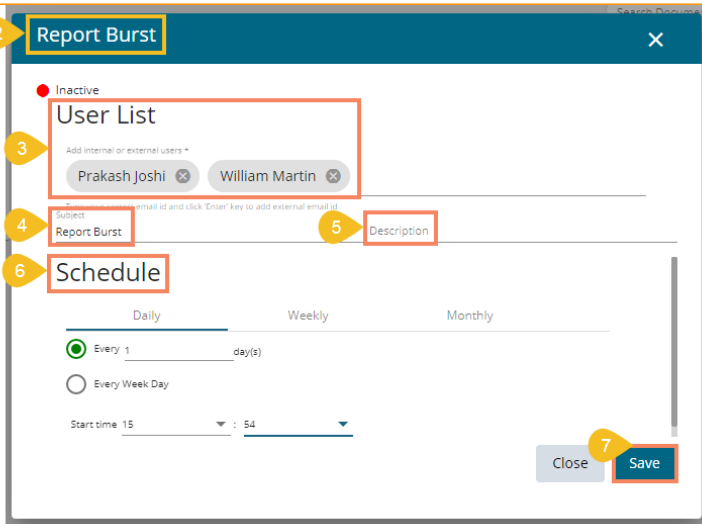
v) The selected story document gets removed.

7.3.9. Report Burst

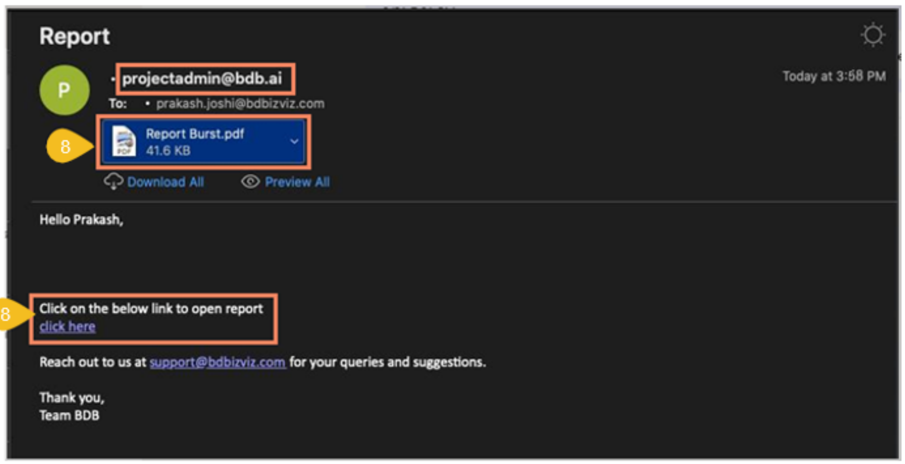
i) Select the '**Report Burst**' option from the Story options menu.



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.

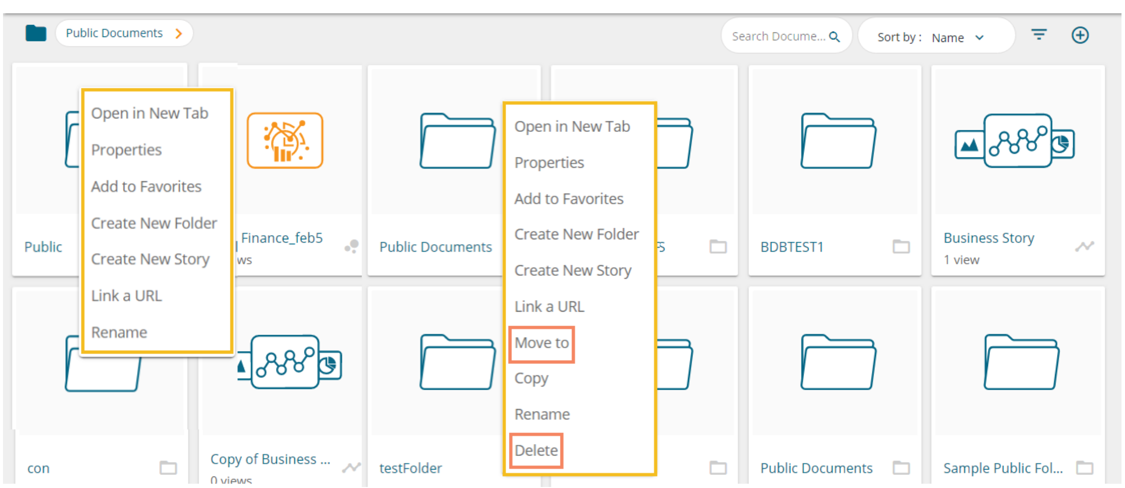


viii) The open document link and PDF report get shared with the selected user(s)/ user group(s).

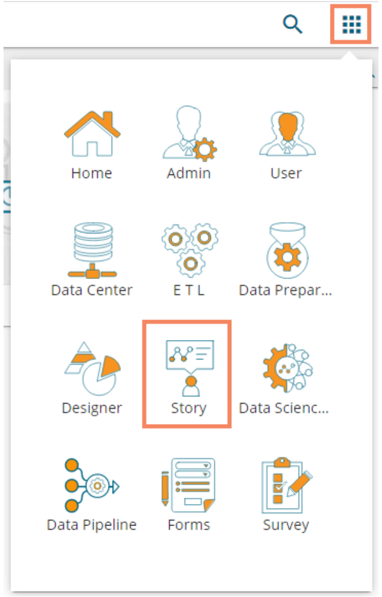


Note:

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.



b. The user can get the ‘**Story**’ option inside the Apps menu as well.

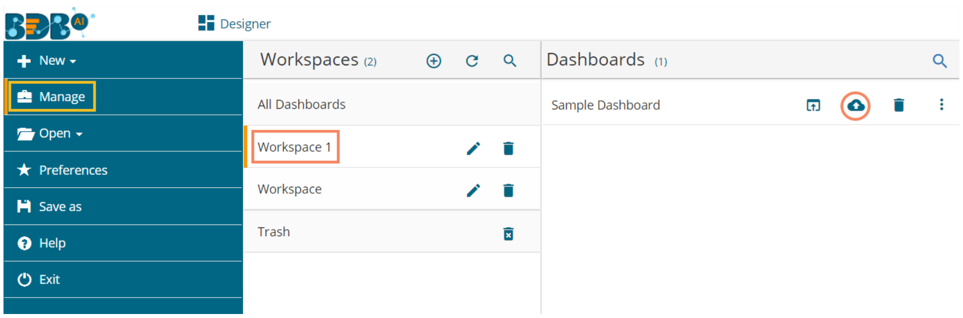


7.4. Published Dashboard on the BDB Platform

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.

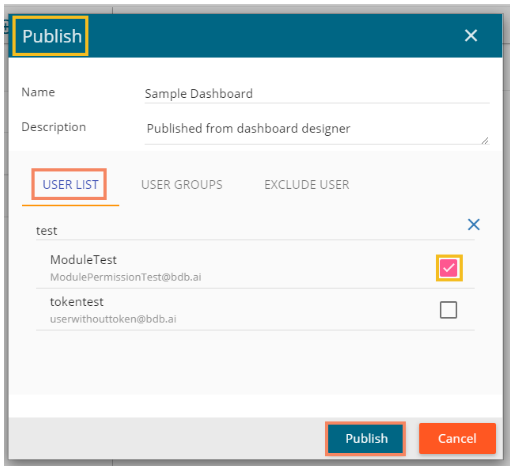
ii) Access the ‘**Publish to Portal**’ option from the list of Dashboards.



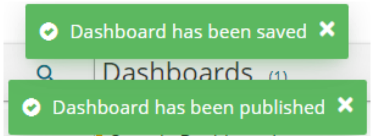
iii) The user gets redirected to a new wizard to choose a user or user group or exclude the user.

iv) Use a checkmark to choose the desired action.

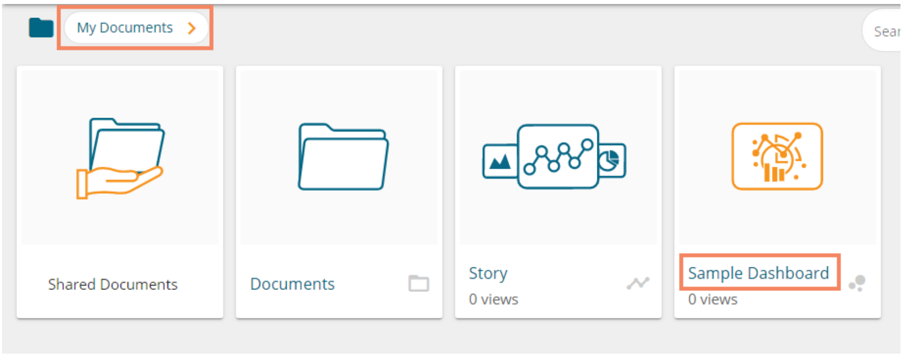
v) Click the ‘**Publish**’ option.



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**.'

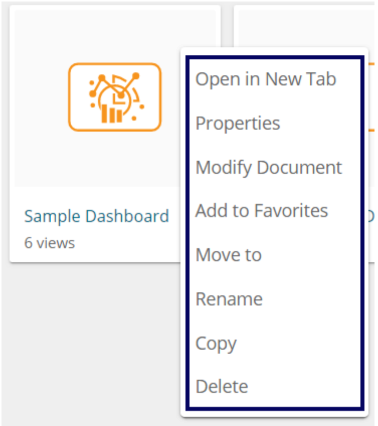


- **Operations Assigned to a Published Dashboard**

i) Navigate to the platform homepage.

ii) Select a published dashboard on My Documents or Public Documents.

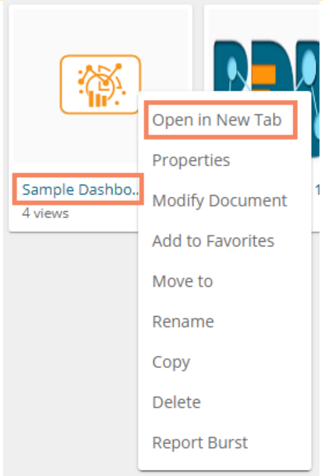
iii) Use a right-click on the published dashboard to open various credited options in a context menu.



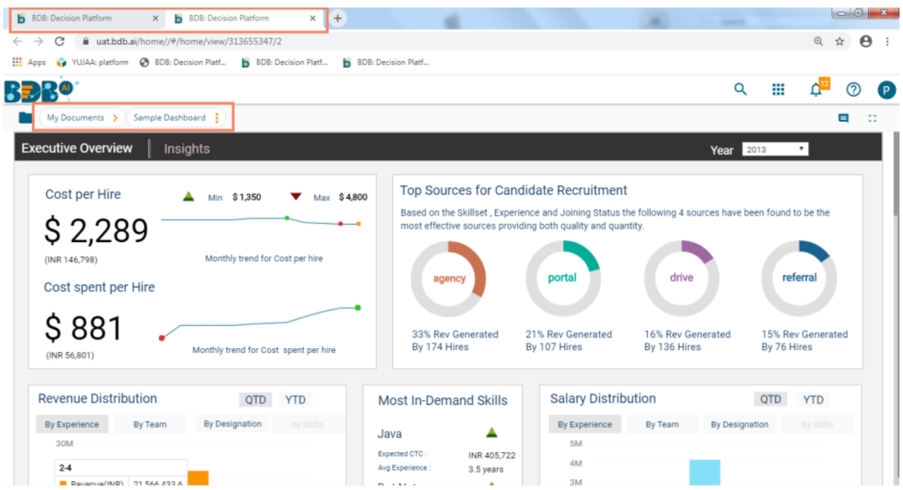
7.4.1. Open in New Tab

The user can open the selected dashboard in a new tab.

i) Select the '**Open in New Tab**' option from the context menu.



ii) The concerned dashboard opens in a new tab.

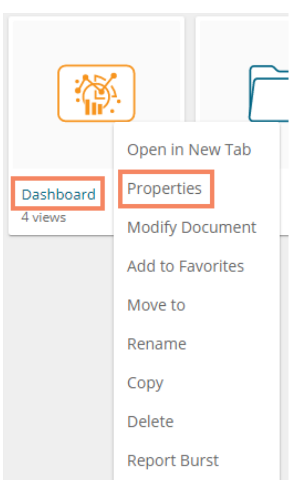


7.4.2. Properties

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

i) Select a dashboard.

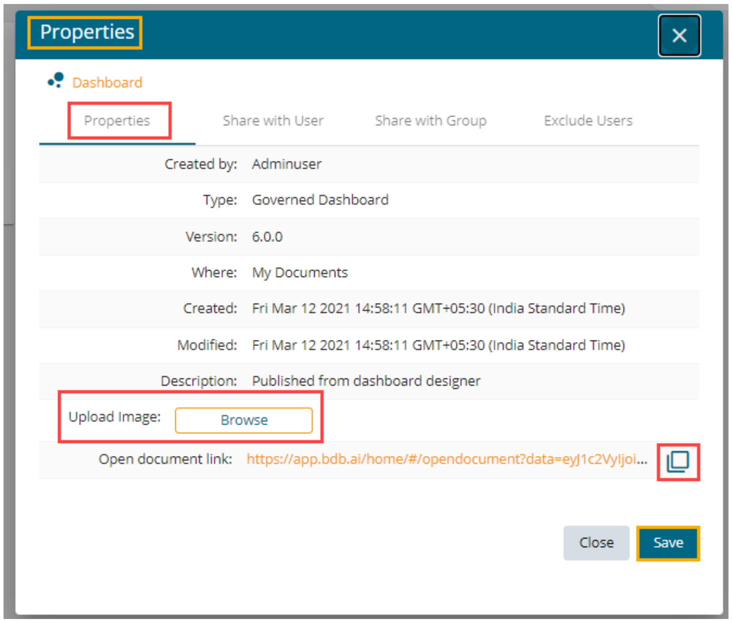
ii) Select the '**Properties**' operation from the context menu.



iii) The Properties window appears with four options.

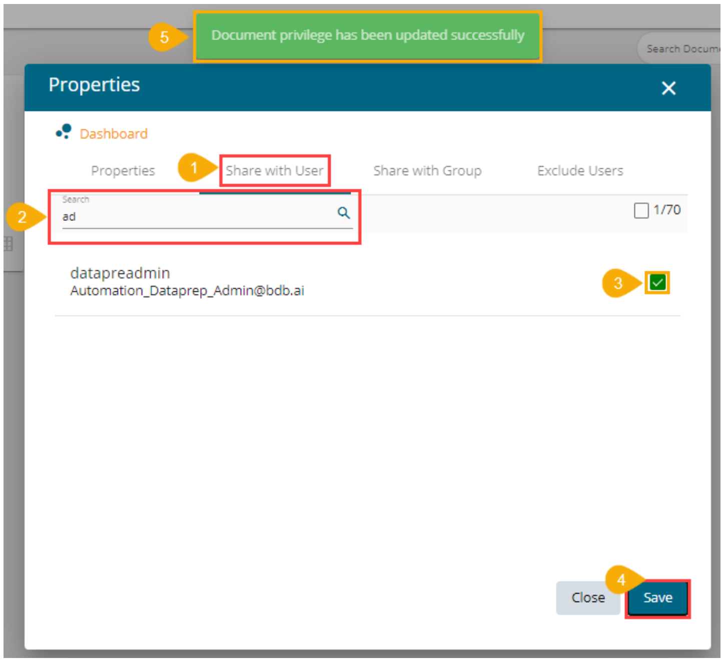
a. **Properties:** The basic dashboard properties get displayed.

1. Click the '**Browse**' option to upload an image.
2. Click the '**Copy Link**' icon to copy the open document link of the published Dashboard.
3. Click the '**Save**' option to save the update.



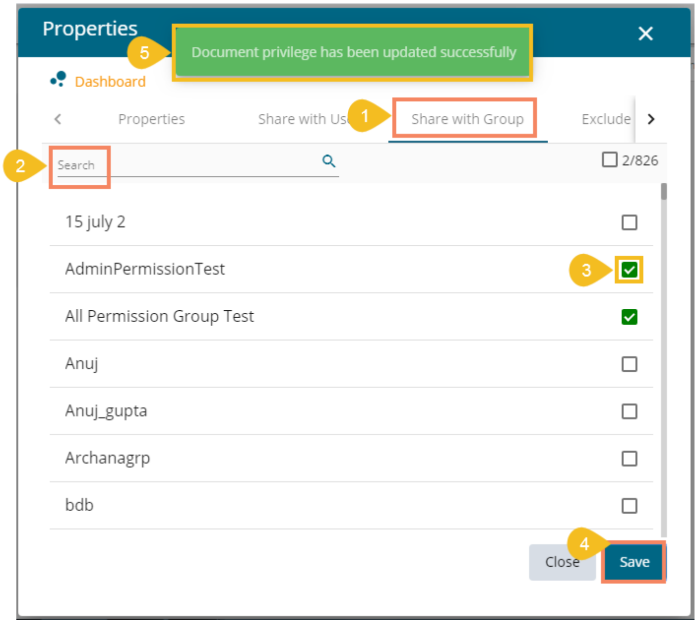
b. **Share with User:** The dashboard gets shared with the selected user(s).

1. Select the '**Share with User'** option on the Properties window.
2. Search a specific user using the search bar.
3. Select a user or all the users by putting checkmark(s) in the given box(es).
4. Click the '**Save**' option.
5. A success message appears stating that the document privilege is updated.



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

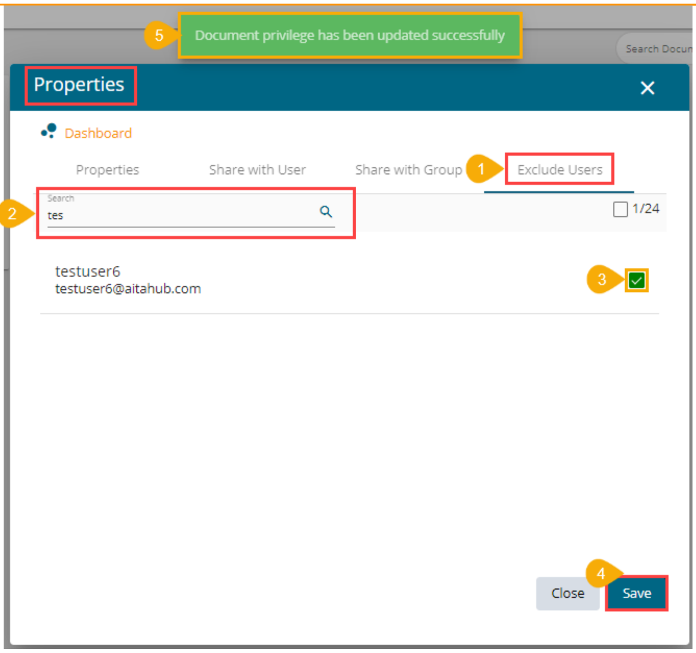
c. **Share with Group:** The dashboard gets shared with the selected group(s).
  1. Select the '**Share with Group**' on the Properties window
  2. Search a specific group by using the search bar.
  3. Select a group or all the groups by putting the checkmark(s) in the given box(es).
  4. Click the '**Save**' option.
  5. A success message appears stating that the document privilege is updated.



  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.

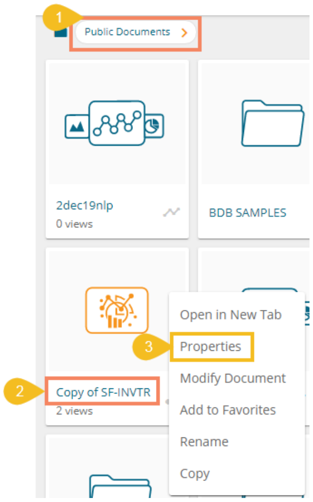
d. **Exclude Users:** The user gets excluded from the rights to access a dashboard**.**
  1. Select the '**Exclude Users'** option on the Properties window.
  2. Search a specific user by using the search bar.
  3. Select a user or all/multiple the users by putting checkmark(s) in the given box(es).
  4. Click the '**Save**' option.
  5. A success message appears, and the document privilege gets updated to exclude the selected user(s).



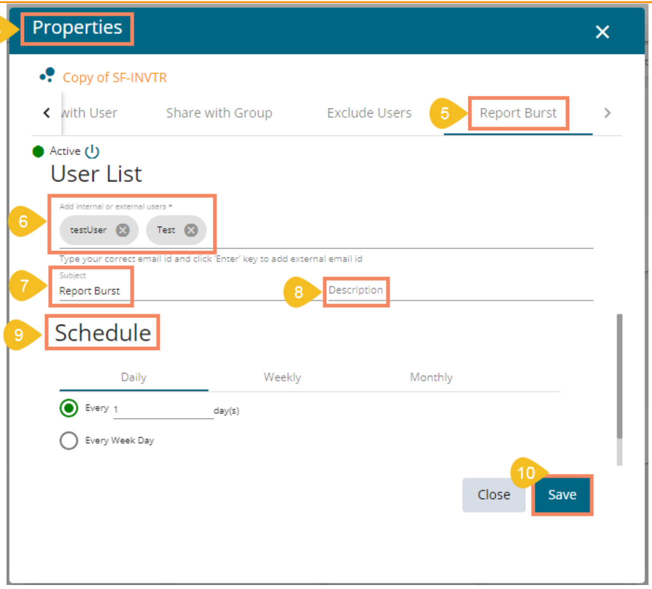
7.4.2.1. Report Burst

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.



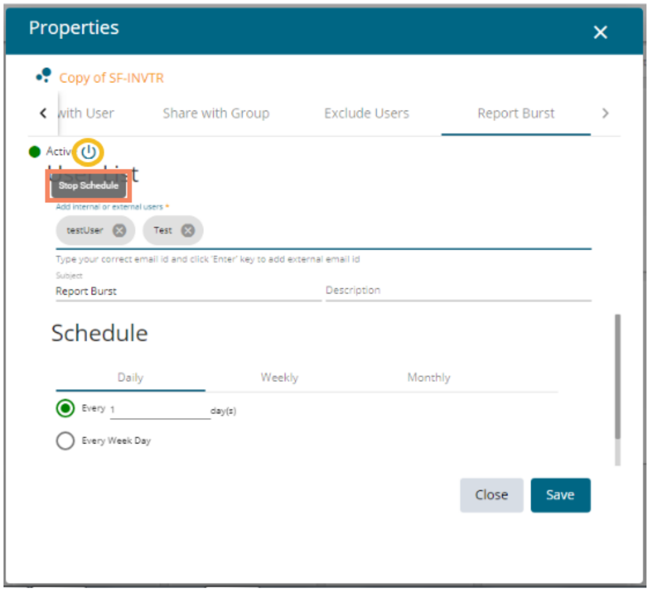
iv) The Properties window opens with multiple tabs.
v) Select the '**Report Burst**' tab.
vi) Add an external or internal user(s).
vii) Provide Subject.
viii) Provide Description (Optional).
ix) Schedule the selected story document by configuring the time range.
x) Click the '**Save**' option.



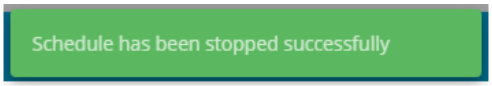
xi) A success message appears.

xii) The Scheduler status becomes active.

xiii) Click the '**Stop Schedule**' button to stop the scheduler.



xiv) A notification message appears to inform the same.

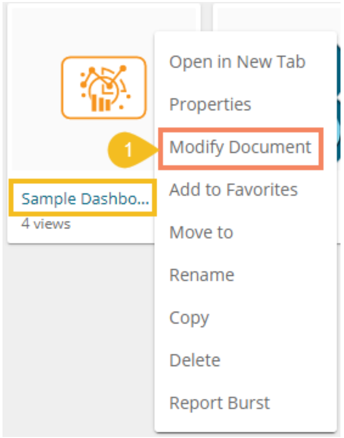


xv) The open doc link of the selected dashboard gets shared to the selected user at the scheduled time through the mail.

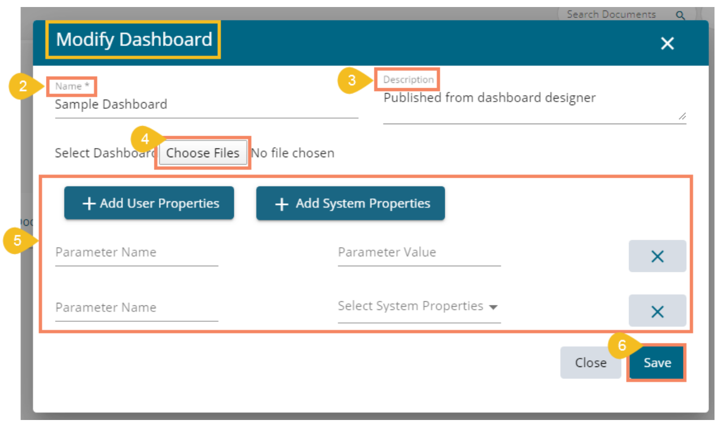
7.4.3. Modifying a Dashboard

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

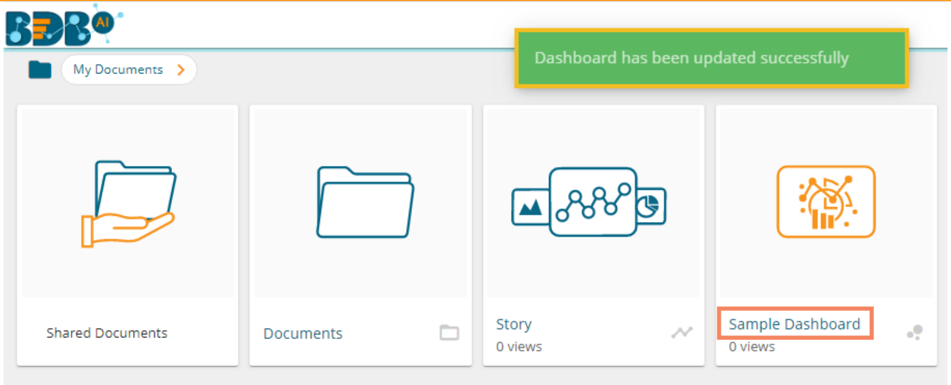
i) Select the '**Modify Document**' option from the Dashboard context menu.



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.



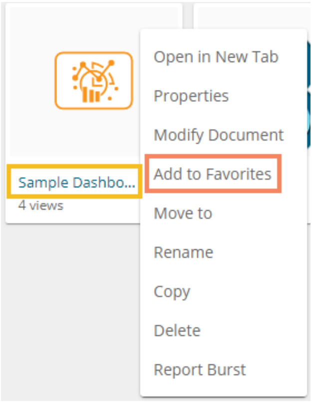
viii) A confirmation message appears to assure that the required data got updated.



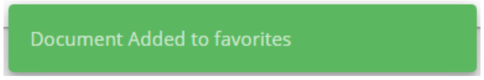
7.4.4. Adding/Removing a Dashboard to/from Favorites)

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

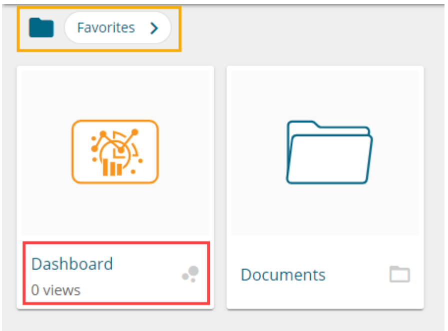
i) Select the '**Add to Favorites**' operation from the Dashboard context menu.



ii) A pop-up window appears with a message, "**Document added to Favorites**"



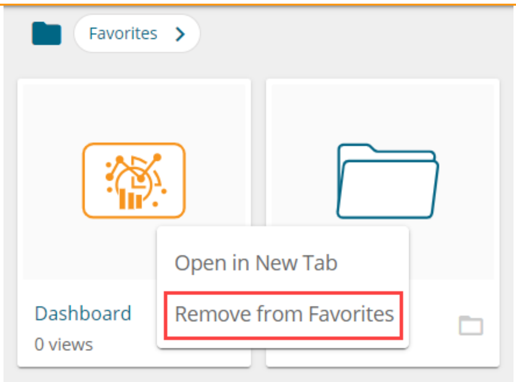
iii) The selected dashboard gets added to the '**Favorites**' section.



iv) Open the '**Favorites**' section.

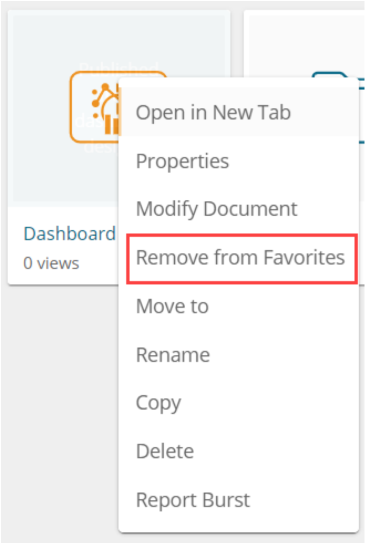
v) Use right-click on the dashboard to get the remove option.

vi) Click the '**Remove from Favorite**' option.

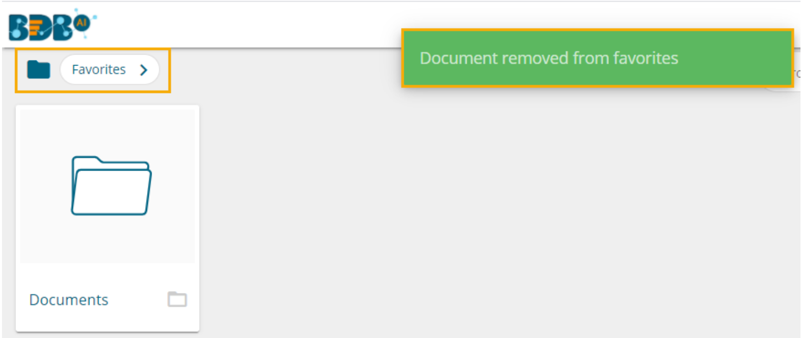


OR

Navigate to the original Dashboard.
Use right-click on the dashboard to get the remove option.
Click the '**Remove from Favorites**' option.



vii) A message appears to notify the removal of the dashboard from the Favorites.
viii) The dashboard gets removed from the **Favorites.**

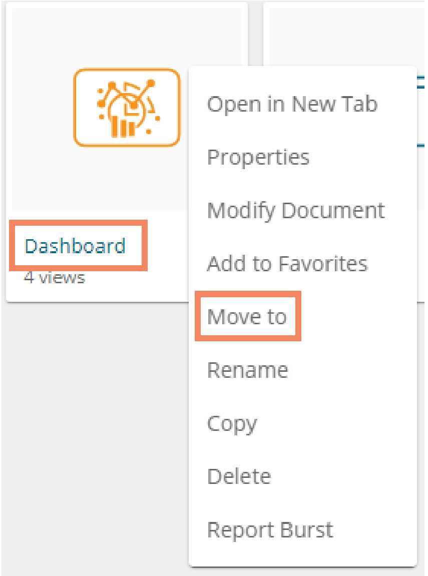


7.4.5. Moving a Dashboard

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.

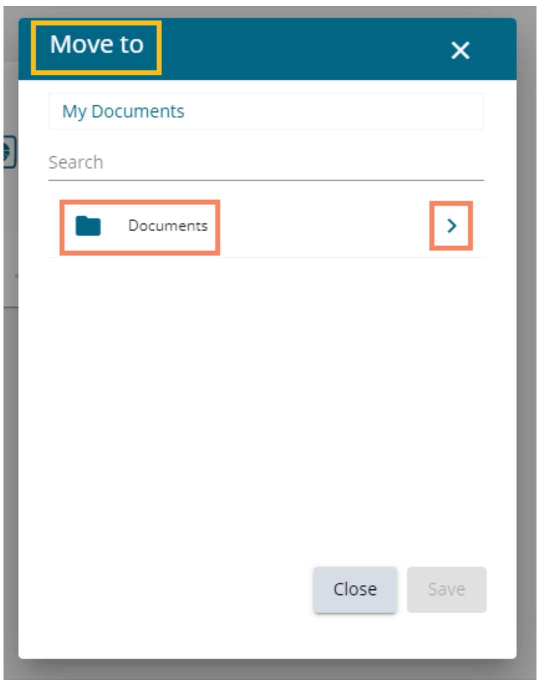
ii) Select the '**Move to**' option from the operation context menu.



iii) The '**Move to**' window appears displaying the available folders.

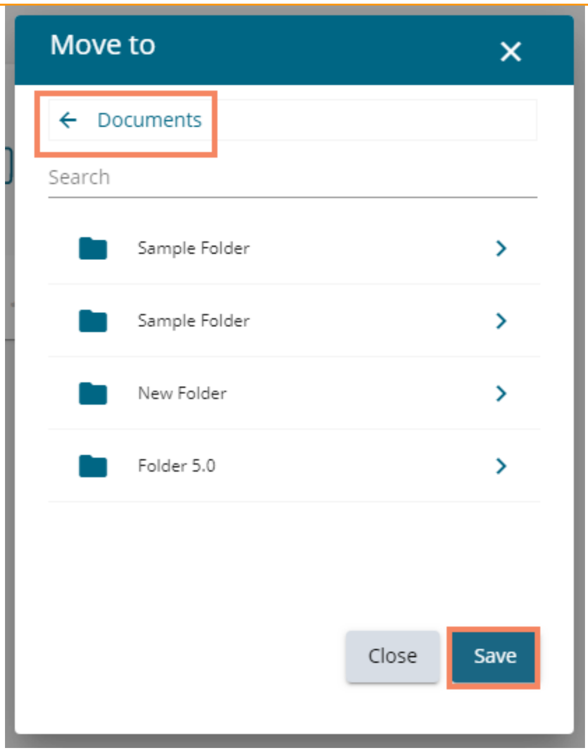
iv) Select a folder.

v) Click the '**Move**' > icon.



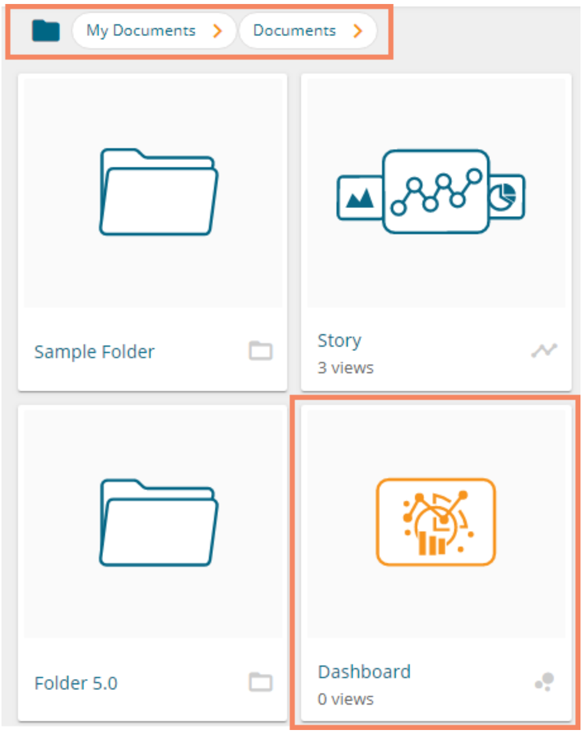
vi) The user gets redirected to the next screen where the selected folder appears on the top.

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



viii) A success message appears.

ix) The dashboard gets moved to the selected space.

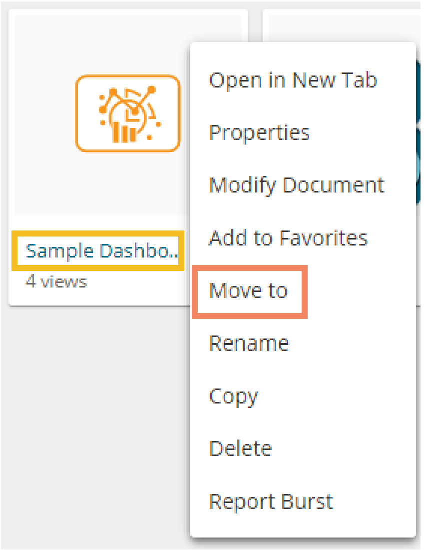


Note: To view a dashboard, use a click on the selected dashboard.

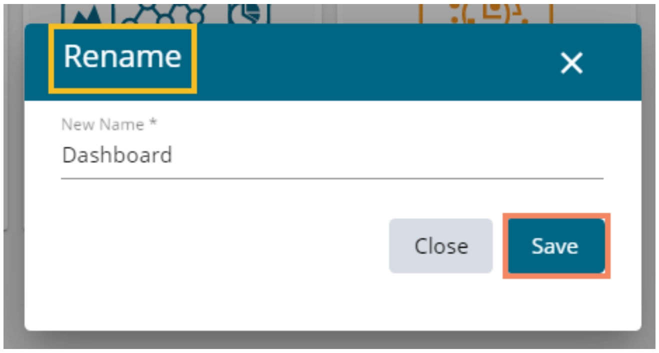
7.4.6. Renaming a Dashboard

The Administrator can change the name of an existing dashboard.

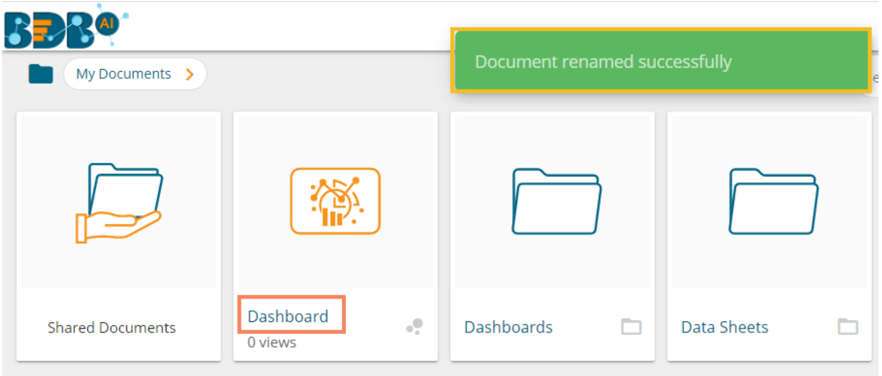
i) Select the '**Rename**' option from the Dashboard Operations menu.



ii) The Rename window opens.
iii) Enter a new name for the dashboard.
iv) Click the '**Save**' option.



v) A message appears to assure the action.
vi) The selected dashboard gets renamed.

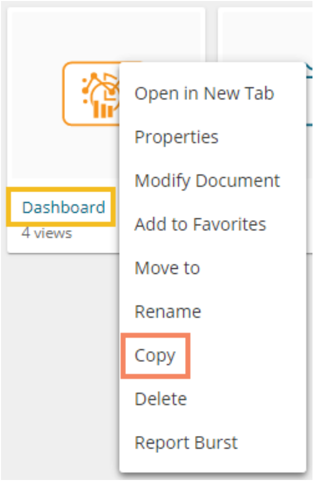


7.4.7. Copying and Moving a Dashboard

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.



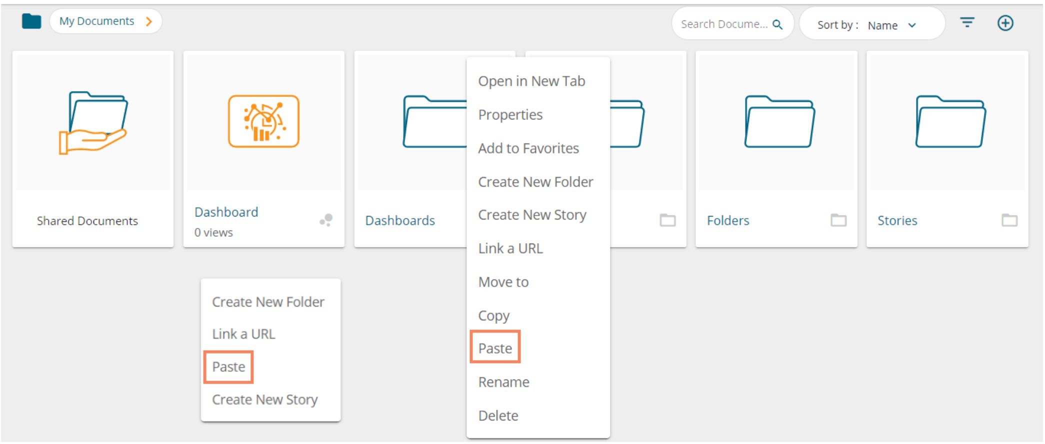
iii) Select another folder and open the menu with the credited options.

Or

iv) Navigate to '**My Documents**' or '**Public Documents**' and right-click anywhere on the blank space.

v) A context menu appears with the '**Paste**' option.

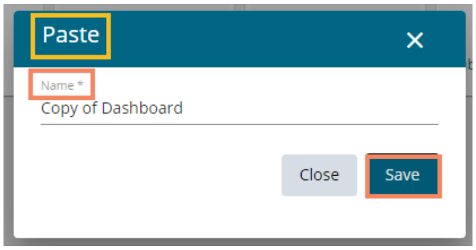
vi) Click the '**Paste**' option.



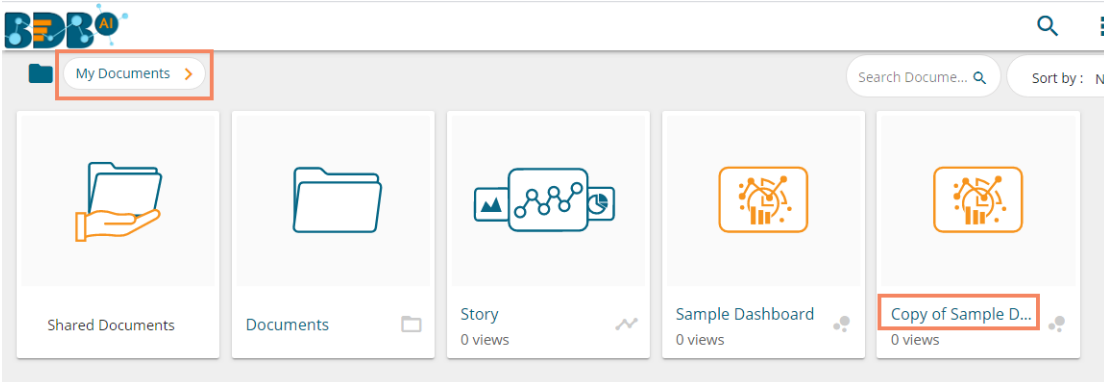
vii) The Paste window opens.

viii) The dashboard name displays 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.



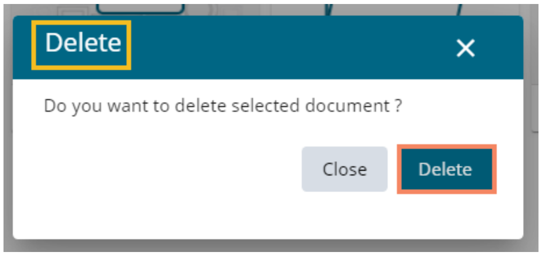
x) The selected dashboard gets copied with a different name.



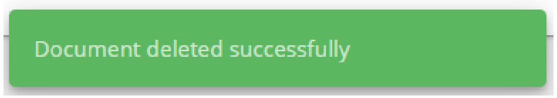
7.4.8. Deleting a Dashboard

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.

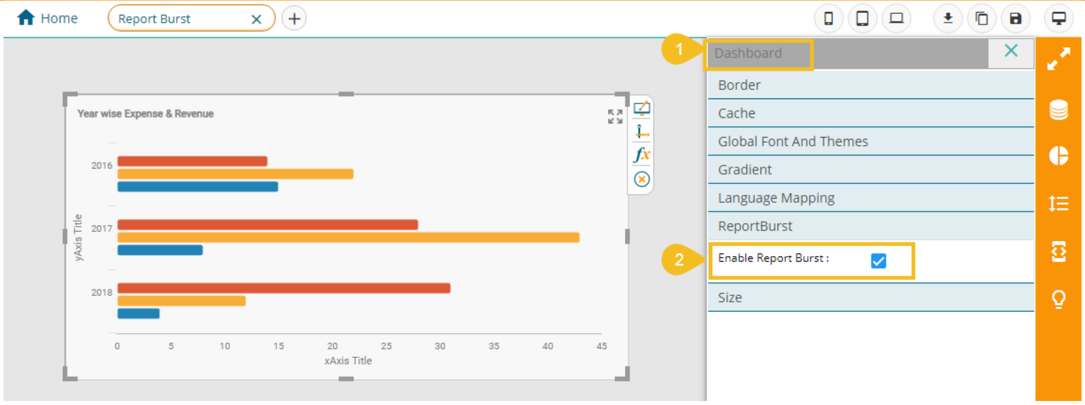


vi) The selected dashboard gets deleted.

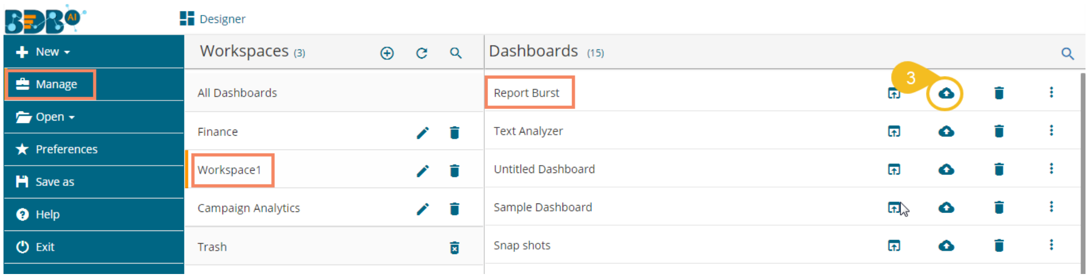
7.4.9. Report Burst

This feature helps to notify the selected users or user groups with the open link and PDF report of the selected dashboard.

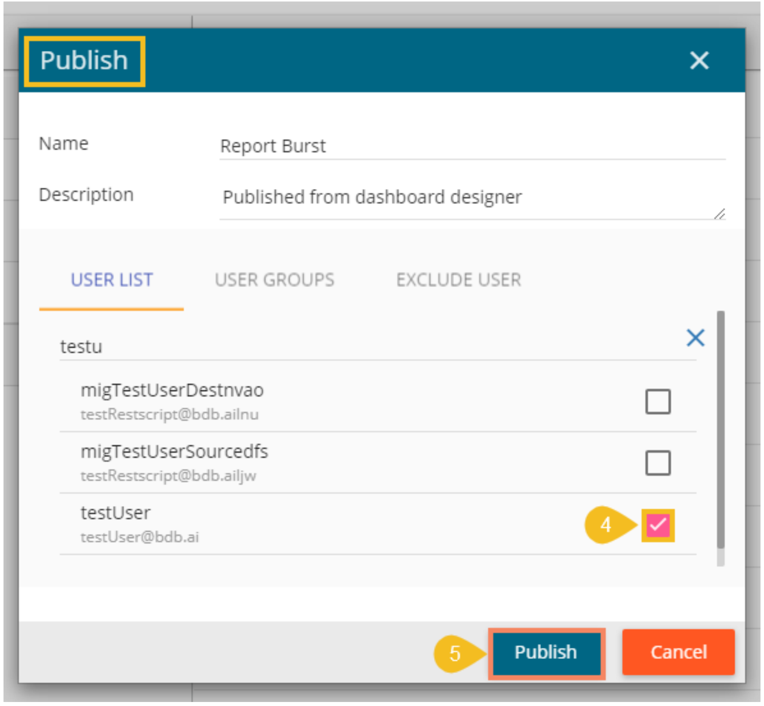
i) Open the Dashboard Properties for a selected dashboard.
ii) The Report Burst option comes enabled by default.



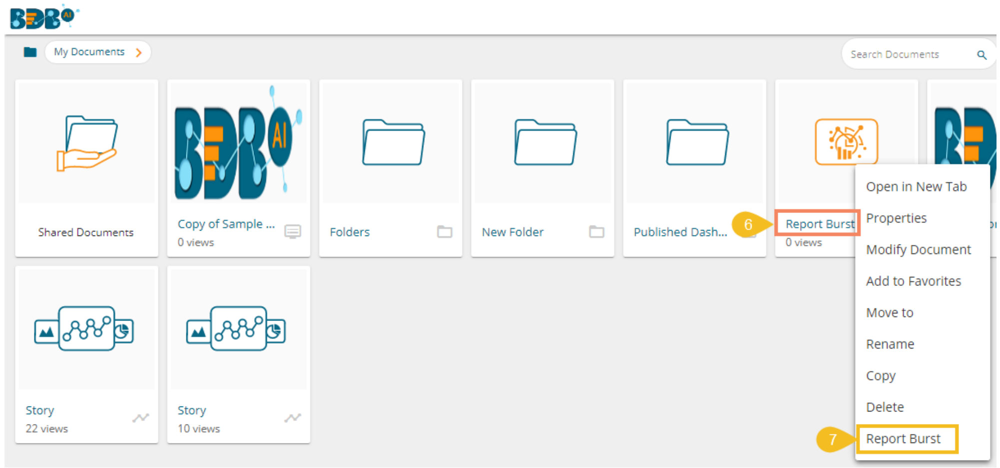
iii) Select the ‘**Publish’** icon for the dashboard.



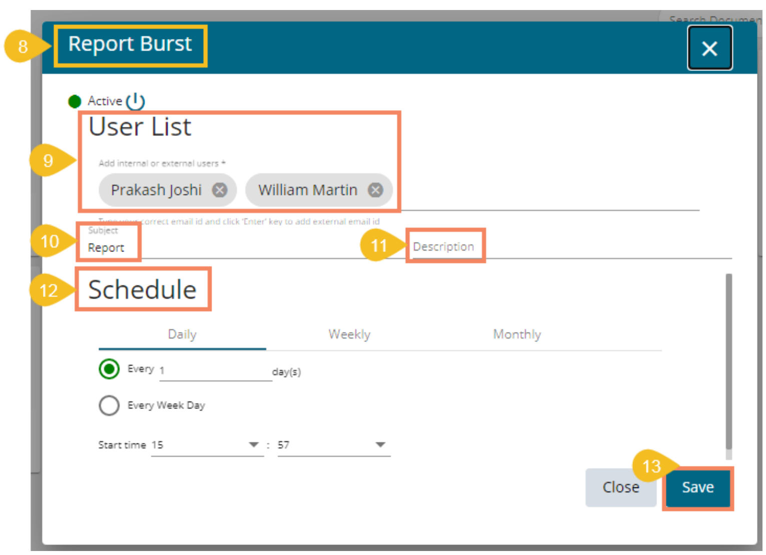
iv) Select specific users/ user groups to whom the dashboard needs to be published.
v) Publish the dashboard to the selected users by clicking the ‘**Publish**’ option.



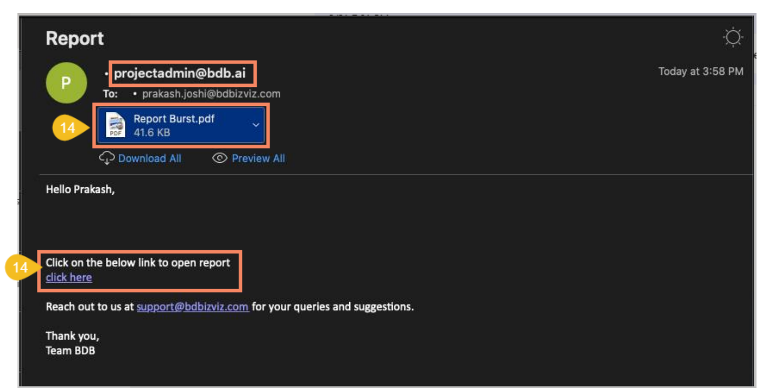
vi) The published dashboard gets added to the selected user account.
vii) Select the ‘**Report Burst**’ option from the options menu.



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.



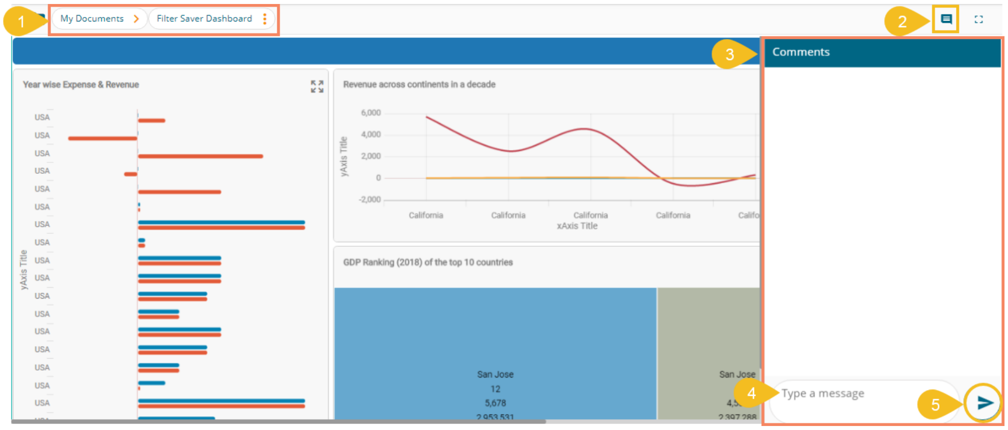
xiv) The open document link and PDF report get shared with the selected user(s)/ user group(s).



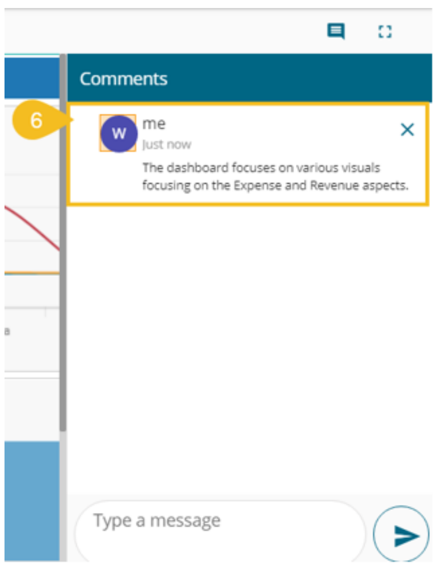
7.4.9.1. Insert Comments

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.



vi) The message gets added to the ‘**Comments**’ window.



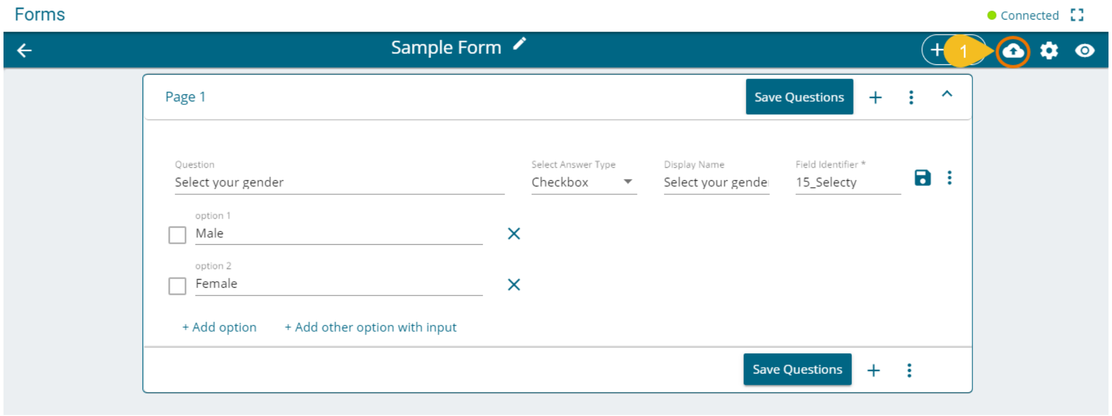
Note:

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

7.5. Published Forms on the BDB Platform

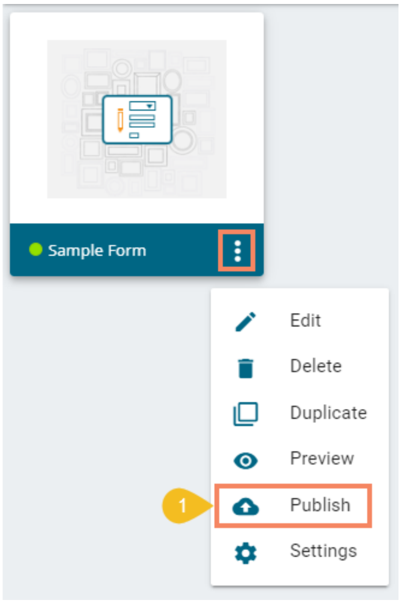
The users can publish the forms created by them to the BDB Platform. The published forms can be accessed on the BDB Platform homepage under the ‘**My Documents**’ section.

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



Or

Click the Publish option using the Form Options menu.

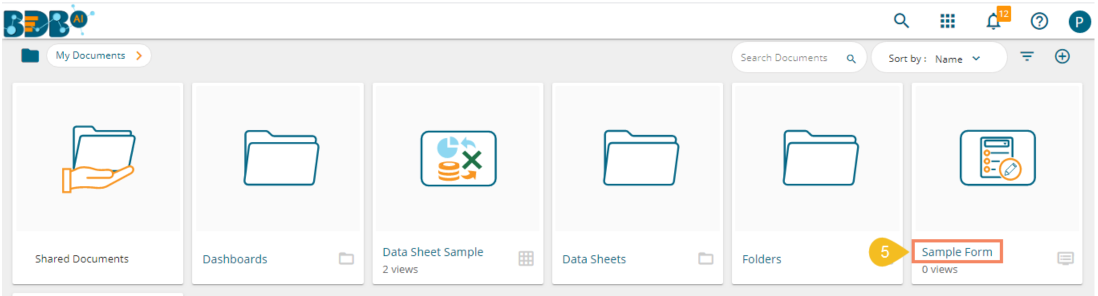


ii) A pop-up window opens to confirm the action.

iii) Click the '**Yes**' option to publish the form.

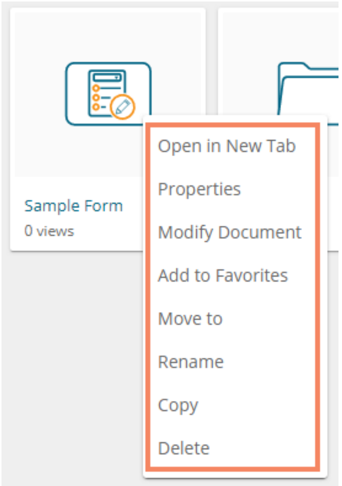
iv) A success message appears to confirm the action of the publish.

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



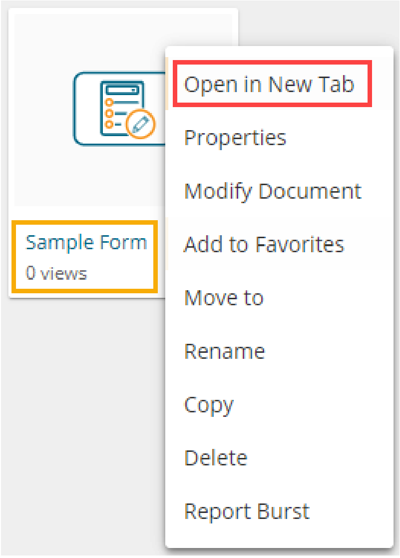
vi) Each published Form is credited with some operations on the BDB Platform.

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

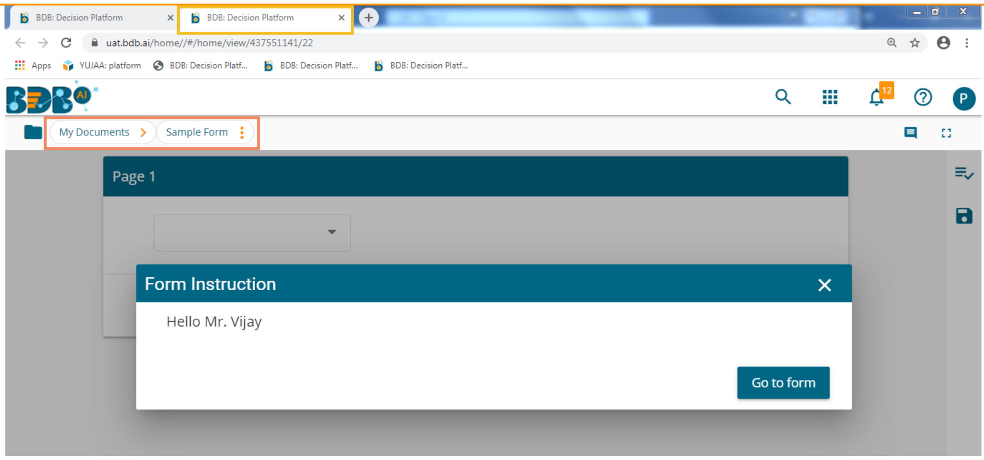


7.5.1. Open in New Tab

i) Select the '**Open in New Tab**' option using the Form operations menu.

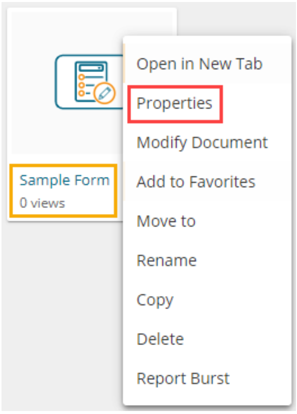


ii) The concerned form opens in a new tab.



7.5.2. Properties

i) Select the '**Properties**' option from the operations menu.

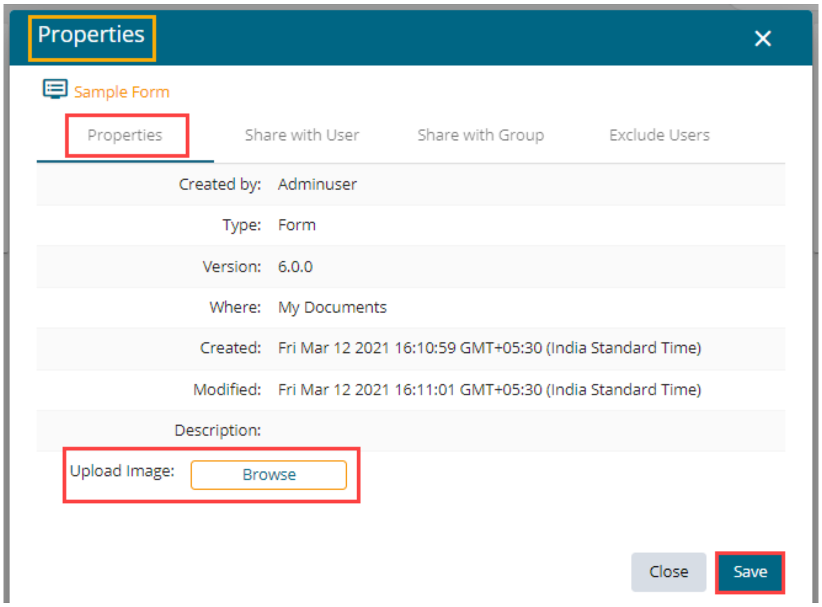


ii) The '**Properties**' window appears with four options:

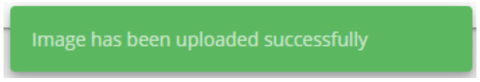
a. Properties: Displays basic details about the Form creation.

i. Click the '**Browse**' option to upload an image.

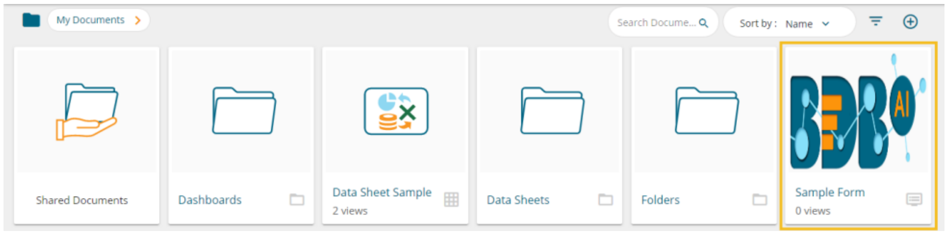
ii. Click the '**Save**' option to save the update.



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

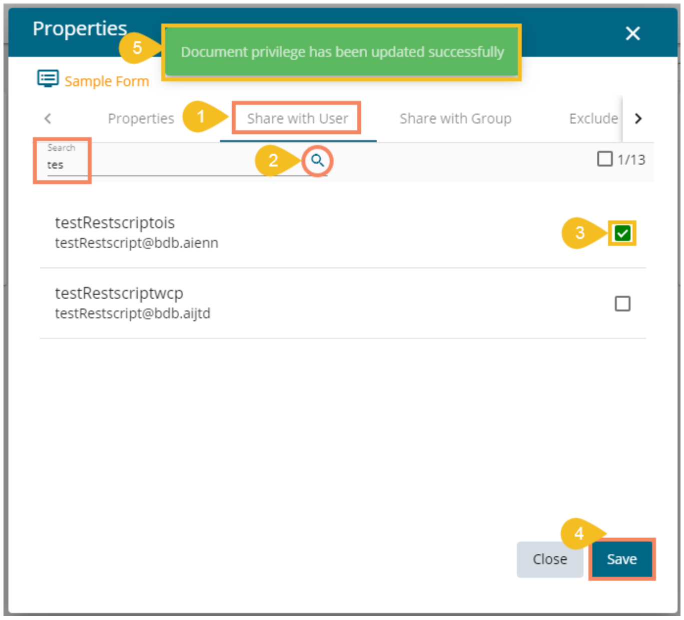
i. Select the '**Share with User**' option using the Properties window.

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.



vi. The Form gets shared with the selected user(s).

c. Share with Group: The Form gets shared with the selected User Group

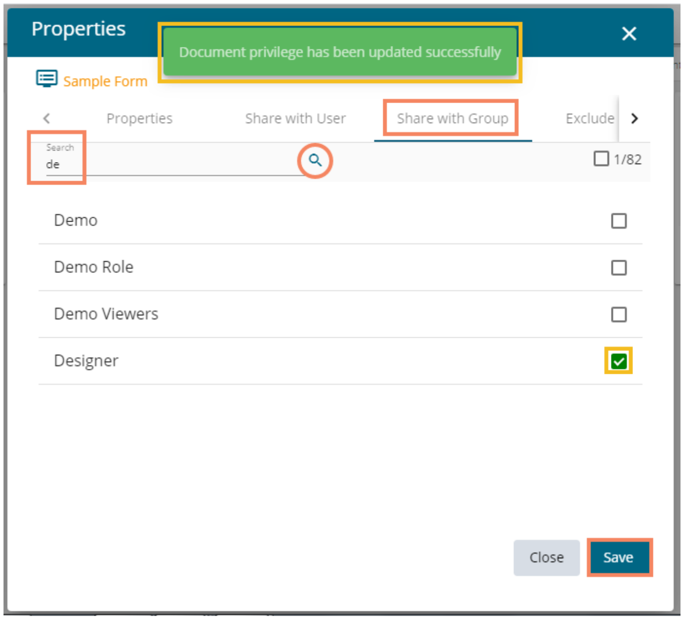
i. Select the '**Share with Group**' option using the Properties window.

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.

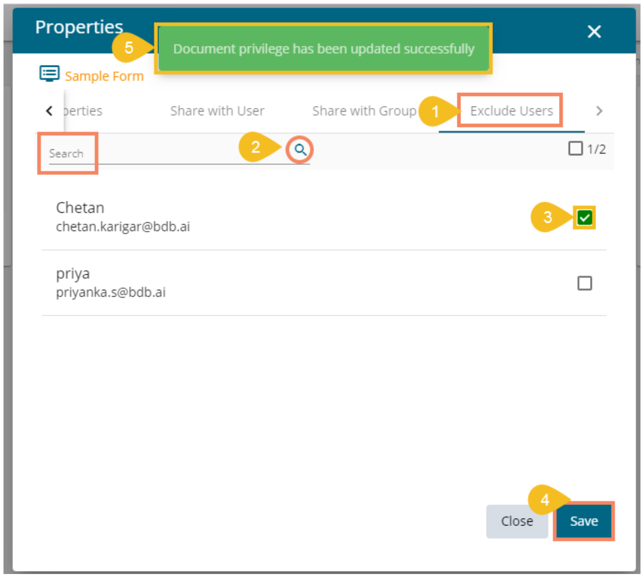
v. A success message appears stating that the document privilege is updated.



vi. The Form gets shared with the selected user group(s).

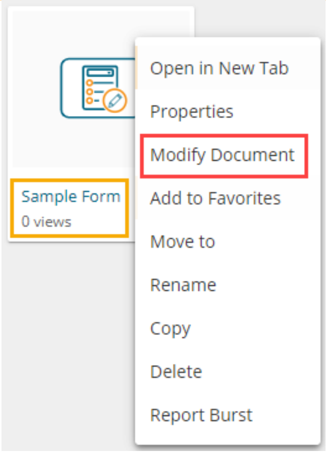
d. Exclude the User: The Selected User gets excluded from the rights to access the Form

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

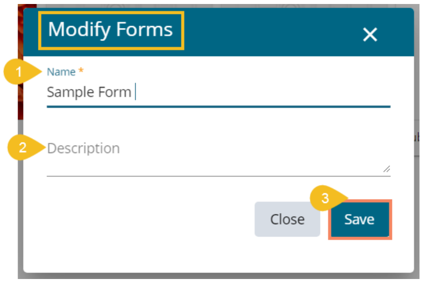
i) Select the '**Modify Document**' option using the Form operations menu.



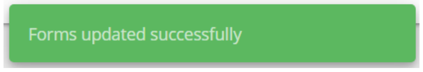
ii) The '**Modify**' window opens for the selected form.

iii) Modify the required information:

a. Name of the Form
b. Description of the Form.
c. Click the '**Save**' option.



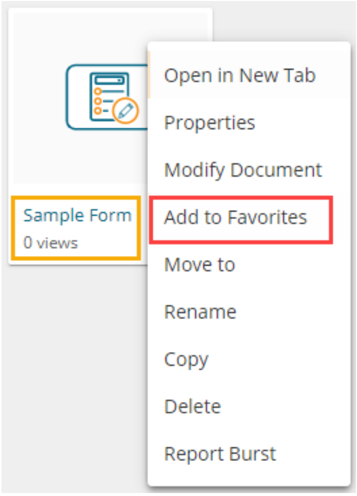
iv) A success message appears.



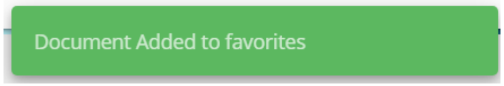
v) The selected information gets modified.

7.5.4. Adding a Form to Favorite

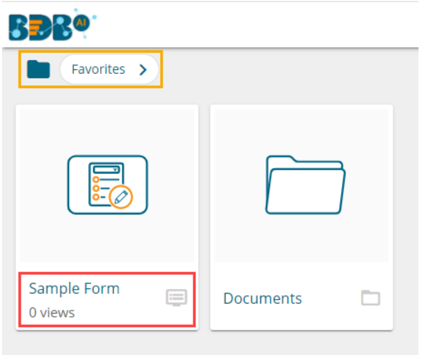
i) Select the '**Add to Favorite**' option from the operations menu.



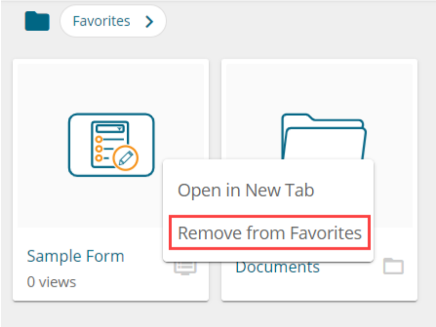
ii) A message appears to assure the success of the action.



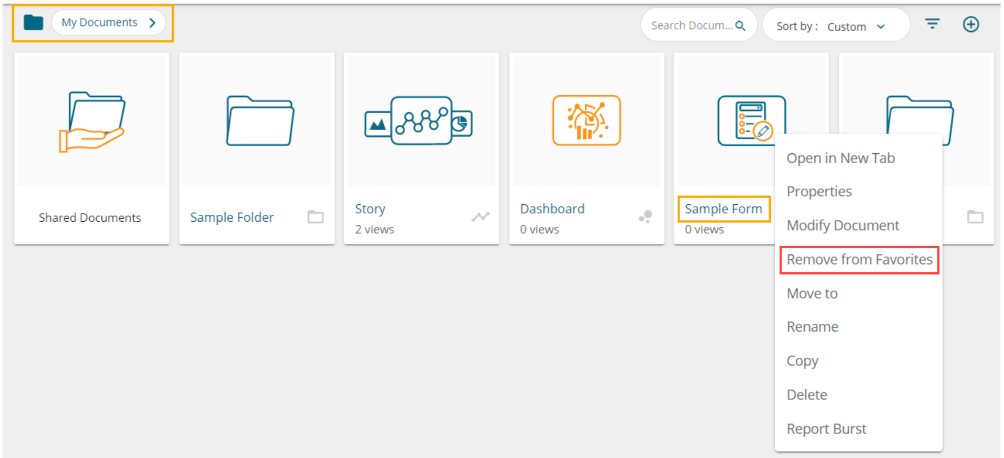
iii) Open the Favorites section.
iv) The selected Form gets added to the Favorites.



v) Navigate to the Favorite space and use the right-click on the Form to get the '**Remove from Favorites**' option.

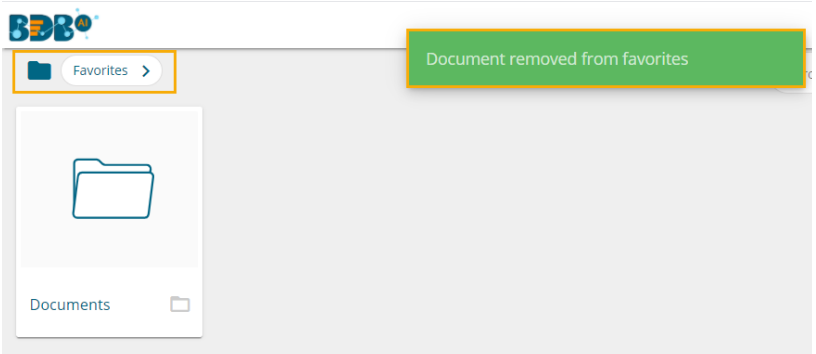


OR
Navigate to the original Form and use right-click on the Form to get the '**Remove from Favorites**' option.



vi) Click the ‘**Remove from Favorites**’ option.

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

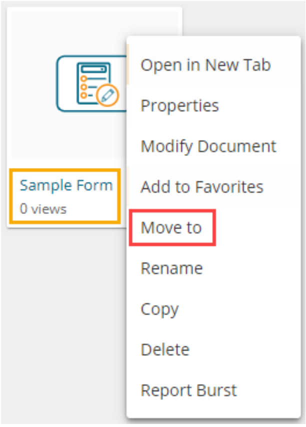


7.5.5. Moving a Form

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

i) Select a Form.

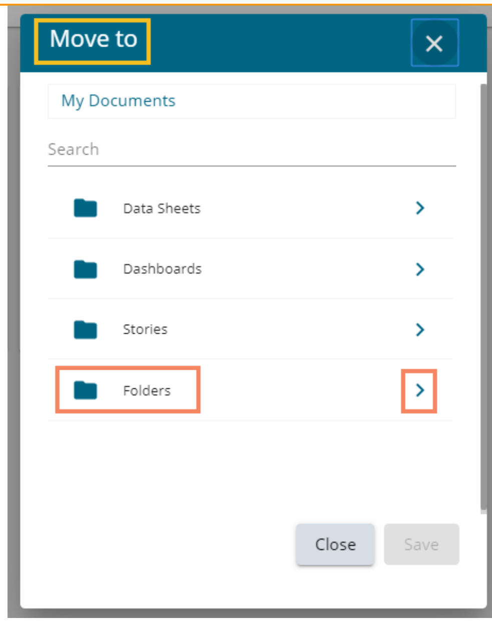
ii) Select the ‘**Move To**’ option from the Options menu.



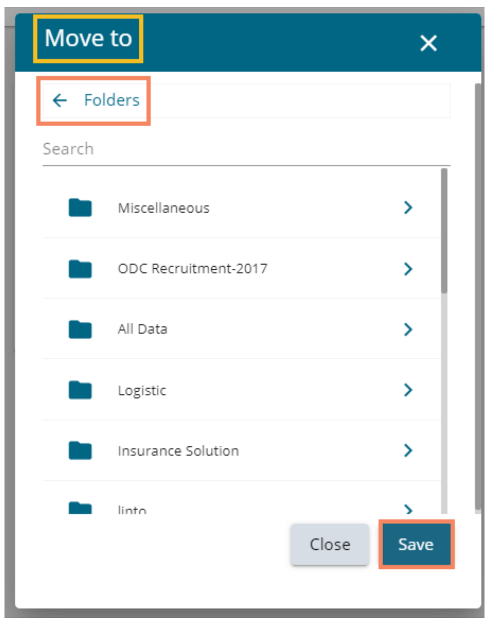
iii) The ‘**Move to**’ window appears displaying the available folders.

iv) Select a folder.

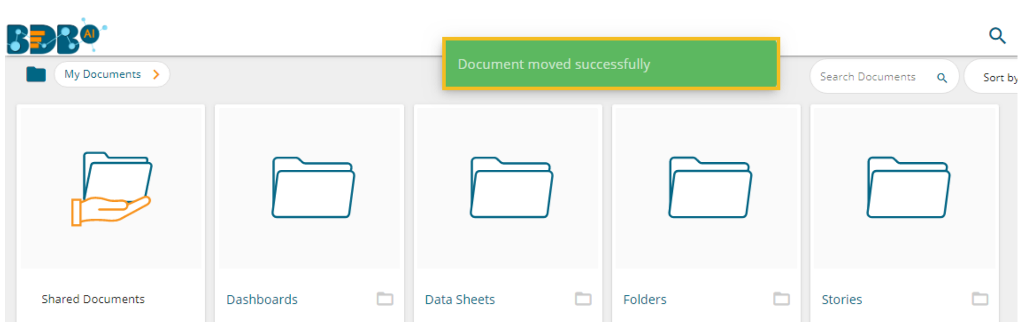
v) Click the ‘**Move**’ icon.



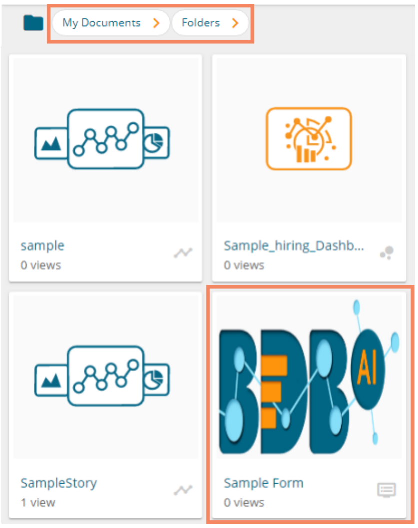
vi) The user gets redirected to the next screen.
vii) Click the '**Save**' option.



viii) A success message appears.



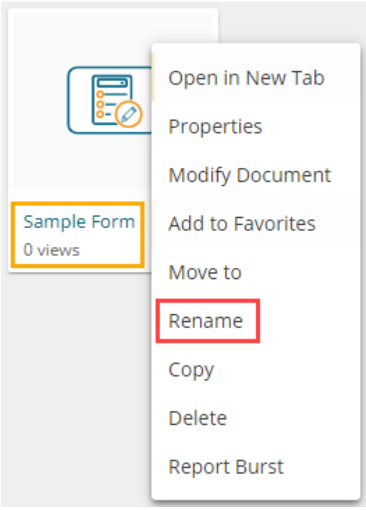
ix) The Form gets moved to the selected space.



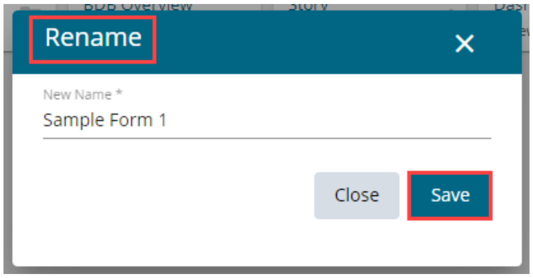
Note: To view a Form, use a click on the selected Form.

7.5.6. Renaming a Form

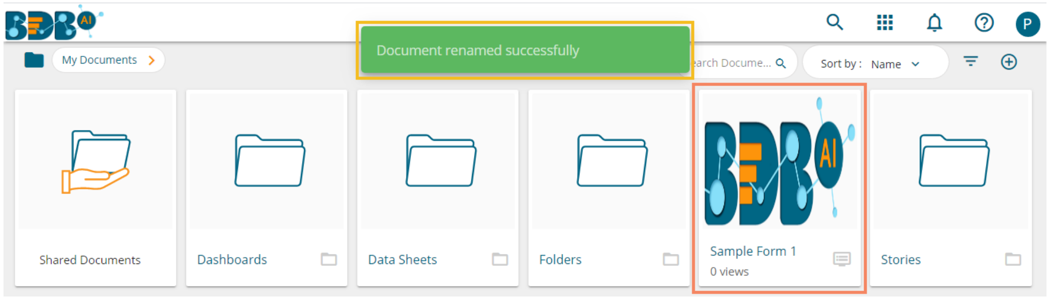
i) Select the '**Rename**' option from the Form Operation menu.



ii) A new window opens prompting to rename the Form.
iii) Provide a New Name for the selected form.
iv) Click the '**Save**' option.

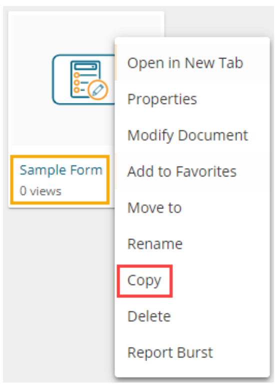


v) The selected form gets renamed.



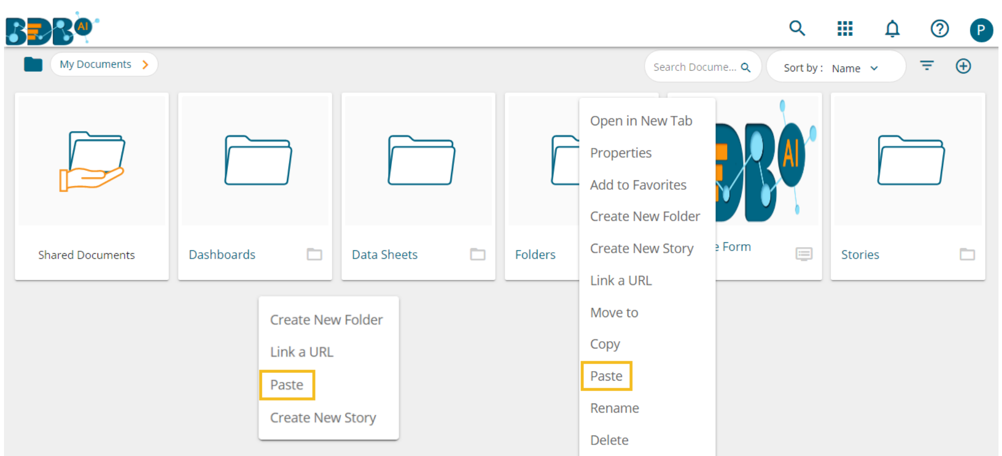
7.5.7. Copying a Form

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



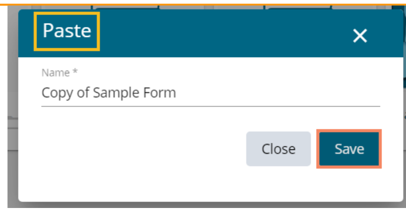
ii) Use the right click on another folder or on the blank space to get the '**Paste**' option.

iii) Click the '**Paste**' option.

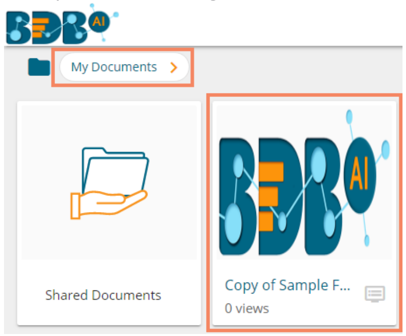


iv) The '**Paste**' window opens, displaying the selected form name with the '**Copy of**' prefix. E.g., A form named ***Sample Form*** gets a new name, ***Copy of Sample Form*** as shown in the following image:

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

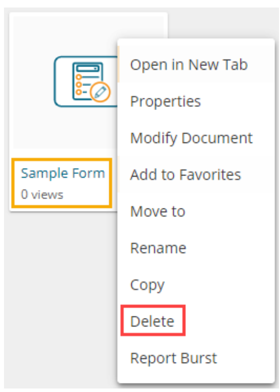


vi) The pasted form gets saved with the new name.



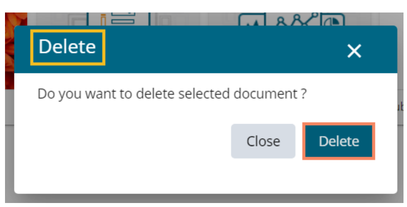
7.5.8. Deleting a Form

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



ii) A message window opens to confirm the action.

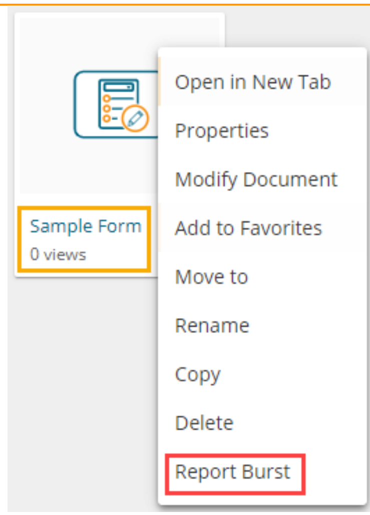
iii) Select the '**Delete**' option to delete the selected form.



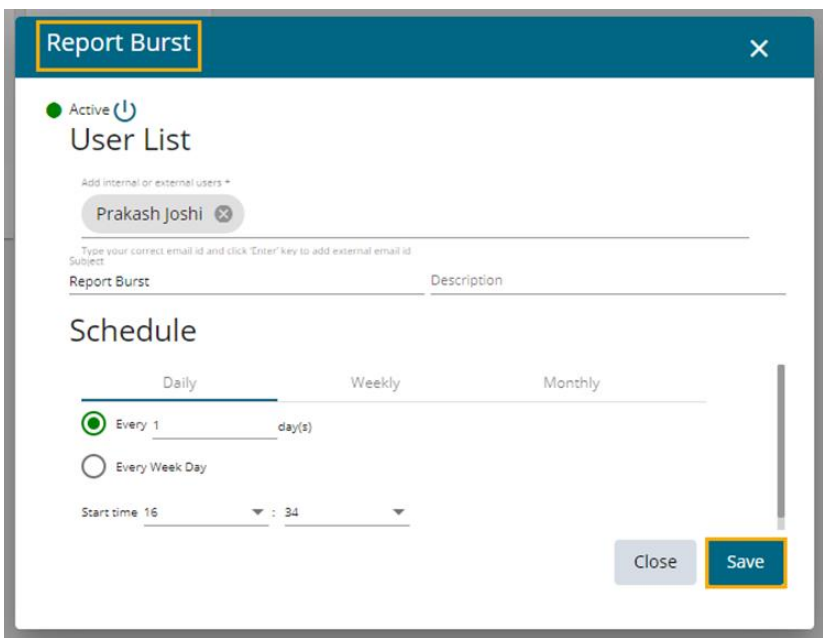
iv) The selected form gets deleted.

7.5.9. Report Burst

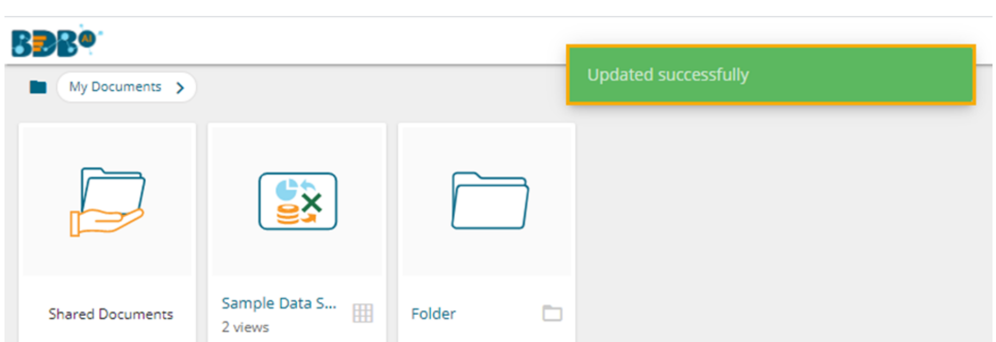
i) Select the '**Report Burst**' option from the Form options menu.



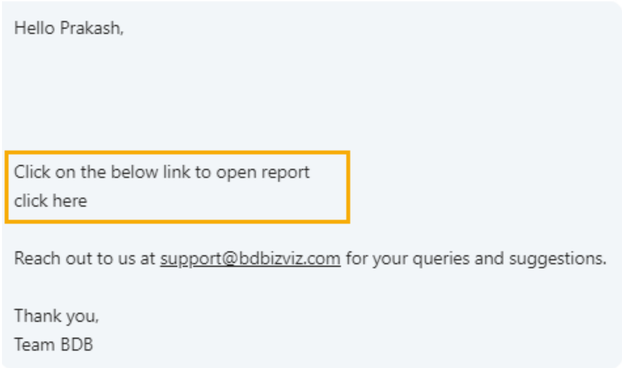
ii) The Report Burst window opens.
iii) Add the users or user groups.
iv) Provide a subject.
v) Provide description (optional).
vi) Schedule the report.
vii) Click the ‘**Save**’ option.



viii) A success message appears.

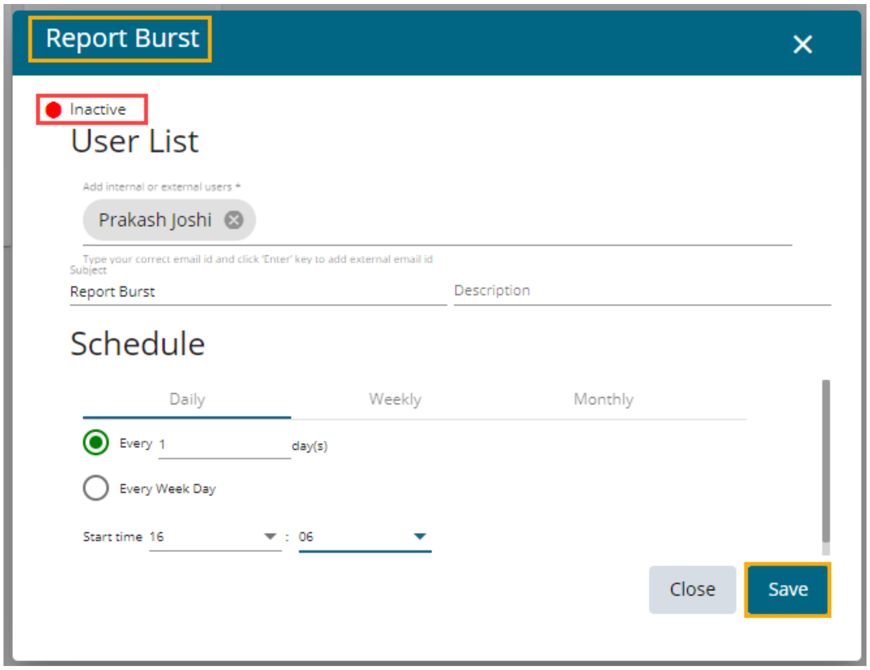


ix) The open document link and PDF report get shared with the selected user(s)/ user group(s).

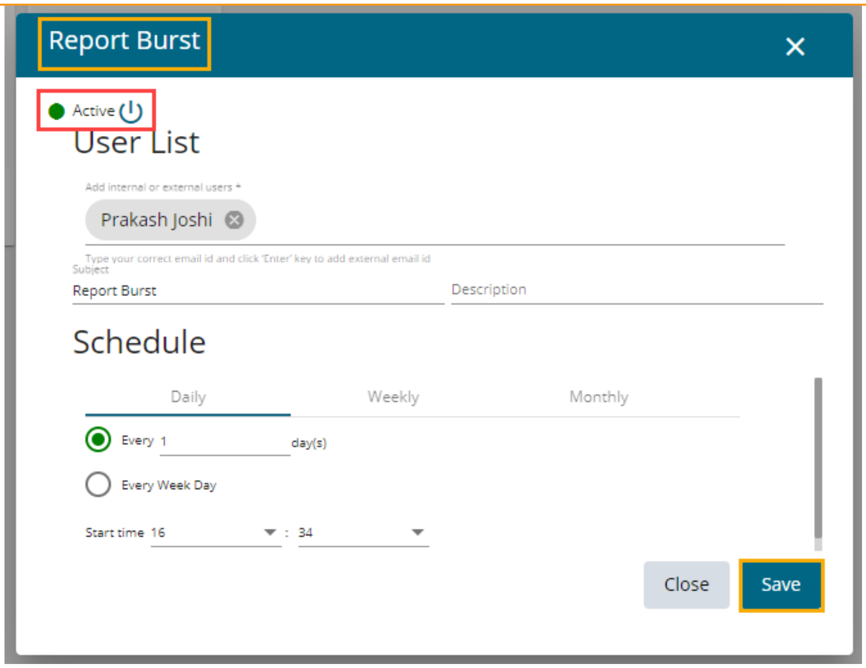


Note: Steps to Stop the Scheduled Report Burst

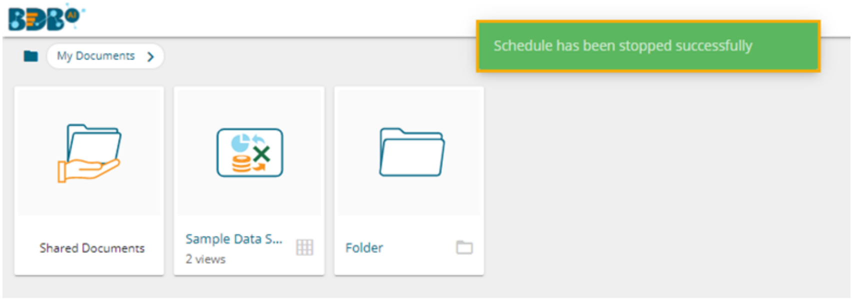
1. The Inactive button gets changed into the Active button after the report bursts details get saved.



2. Click the Active button.
3. Click the '**Save**' option.



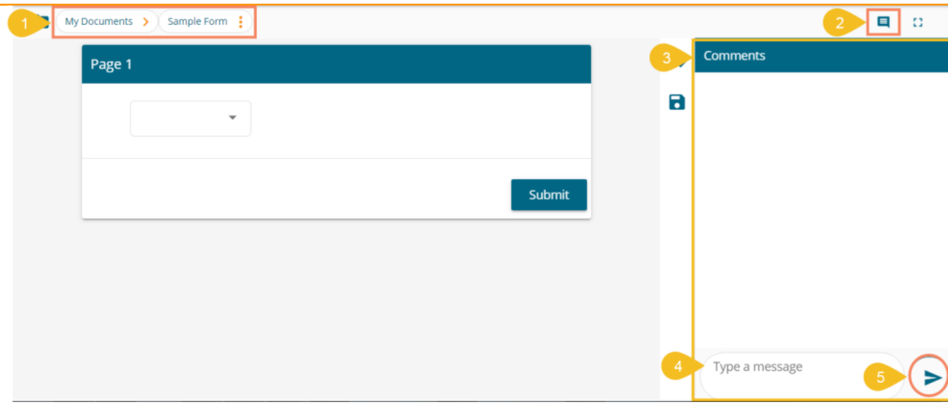
4. A success message appears to inform the user that the schedule has been stopped.



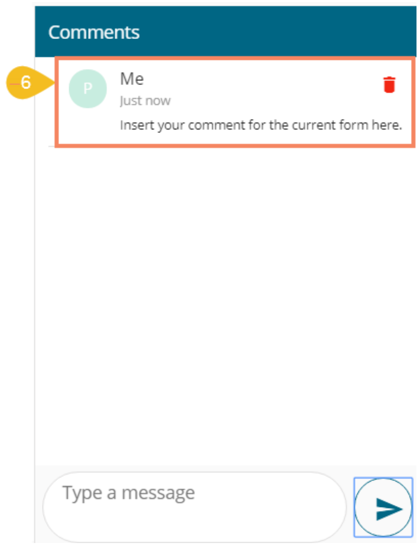
7.5.9.1. Insert Comments

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.



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

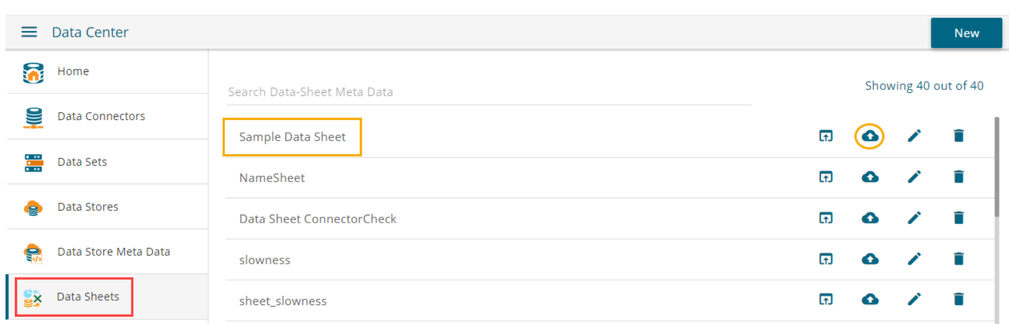


Note: **Full Screen** / **Reduce Size** icon is provided to view the form in full screen or reduce the form screen size.

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.

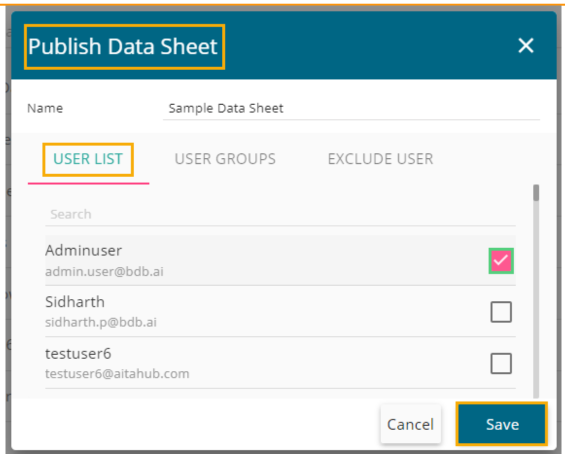
i) Click the '**Publish**' icon for the selected Data Sheet.



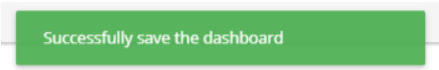
ii) The Publish Data Sheet window opens.

iii) Select a user(s) by using the USER/ USER GROUP(s) tab.

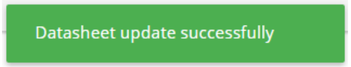
iv) Click the '**Save**' option.



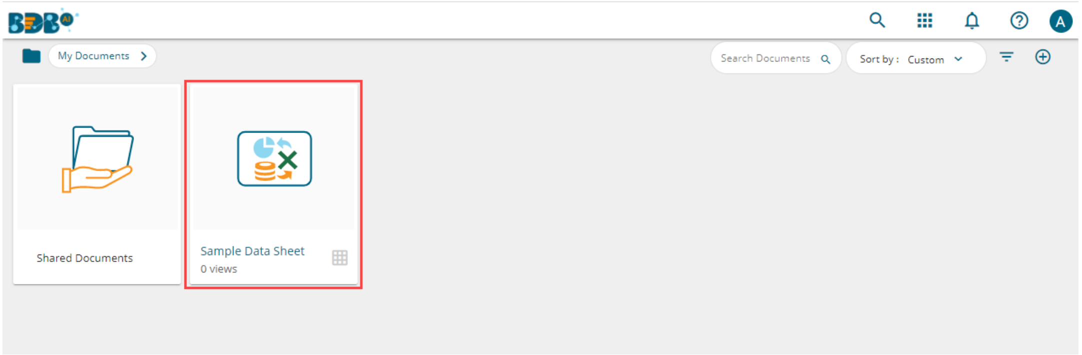
v) A success message appears to inform that the dashboard has been saved.



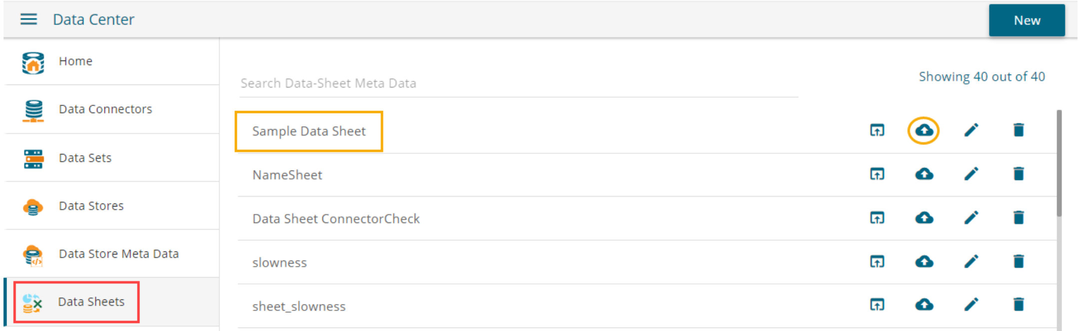
vi) Another success message appears to inform that the datasheet has been updated successfully.



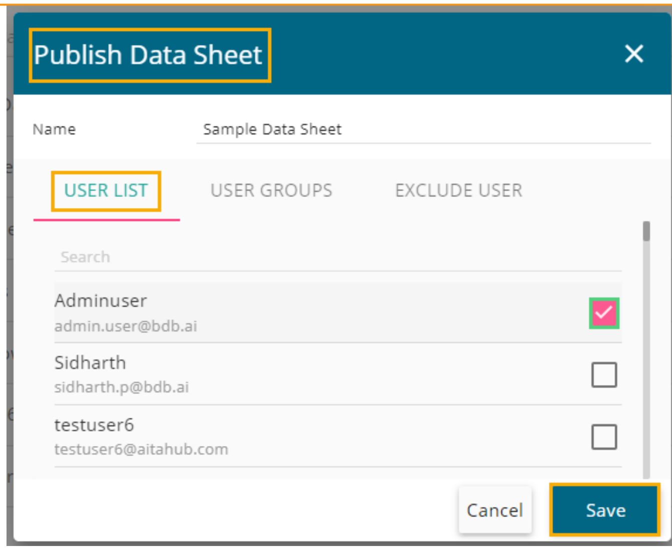
vii) The Data Sheet gets published under the My Documents space of the selected user.



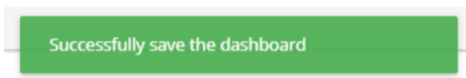
viii) Click the '**Publish**' icon for the selected Data Sheet.



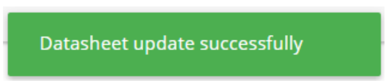
ix) The Publish Data Sheet window opens.
x) Select a user(s) by using the USER/ USER GROUP(s) tab.
xi) Click the '**Save**' option.



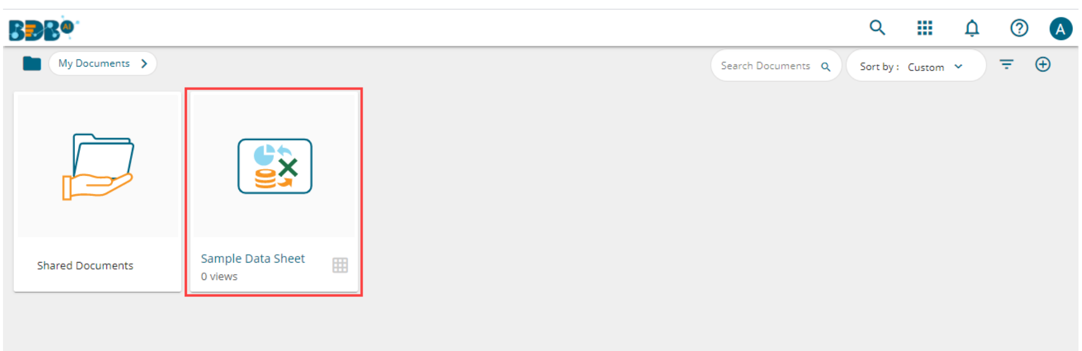
xii) A success message appears to inform that the dashboard has been saved.



xiii) Another success message appears to inform that the datasheet has been updated successfully.

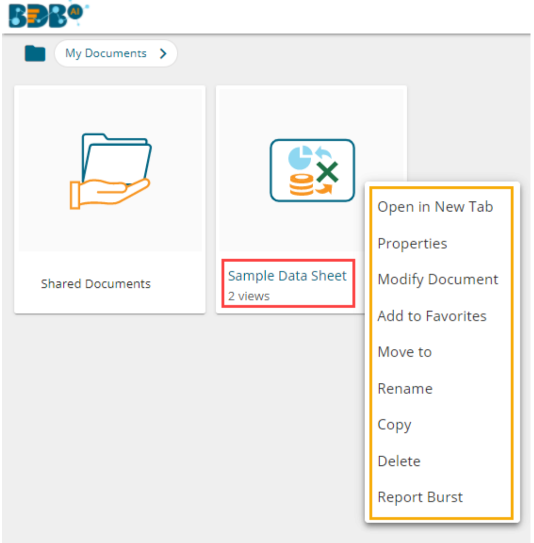


xiv) The Data Sheet gets published under the My Documents space of the selected user.



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.

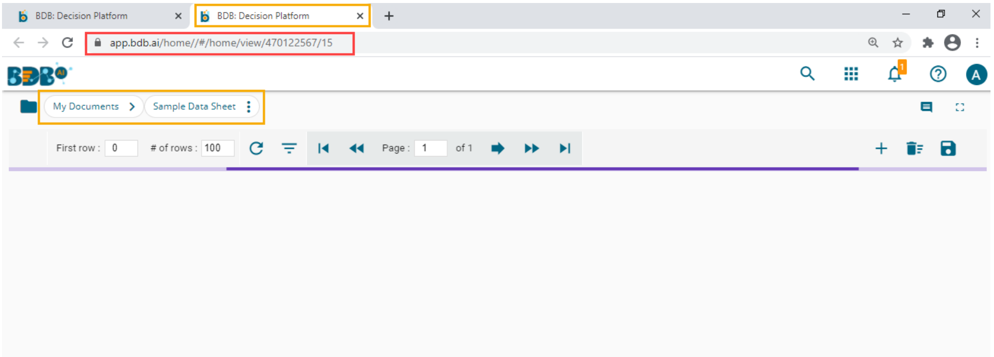
xv) Select a published Data Sheet from the My Documents.
xvi) Use the right click to get the options context menu.



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.



7.6.2. Properties

i) Click the '**Properties**' option.

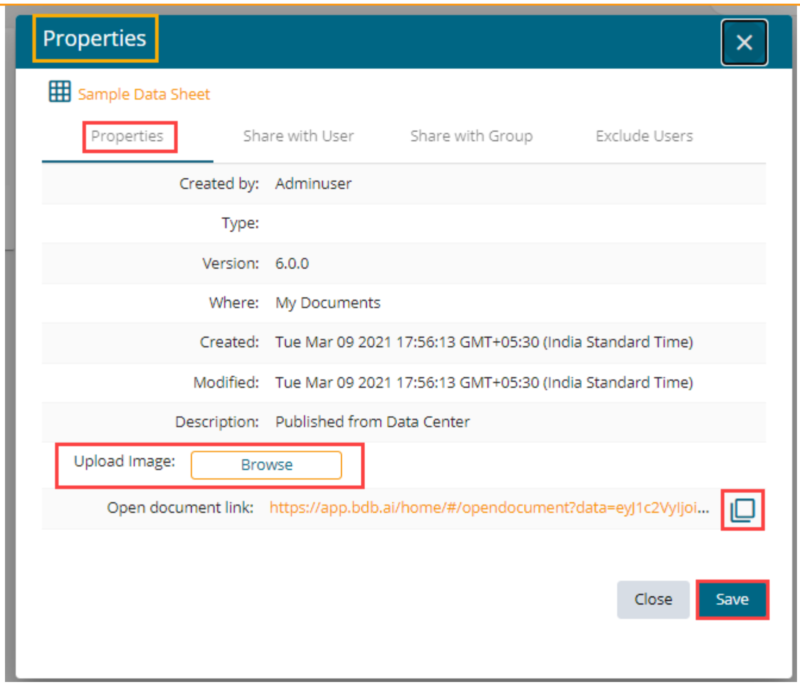
ii) The Properties window opens with four options.

a. Properties: Displays the basic properties and open document link of the selected Data Sheet**.**

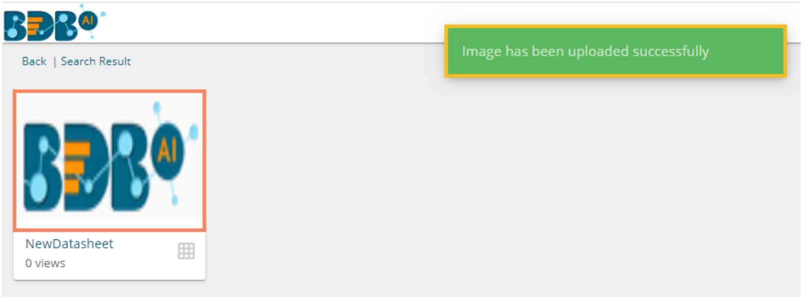
i. The user can upload an image by using the '**Browse**' option.

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.

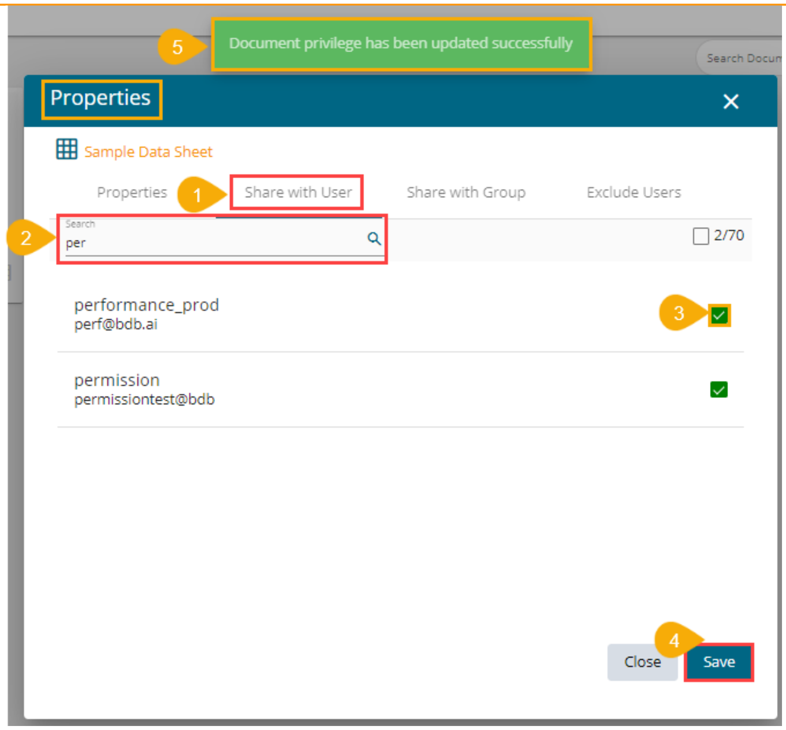


Note: The user gets a success message when the image gets updated on the selected Data Sheet. The selected image gets uploaded on the Data Sheet.



b. Share with User: The Data Sheet gets shared with the selected user or users.

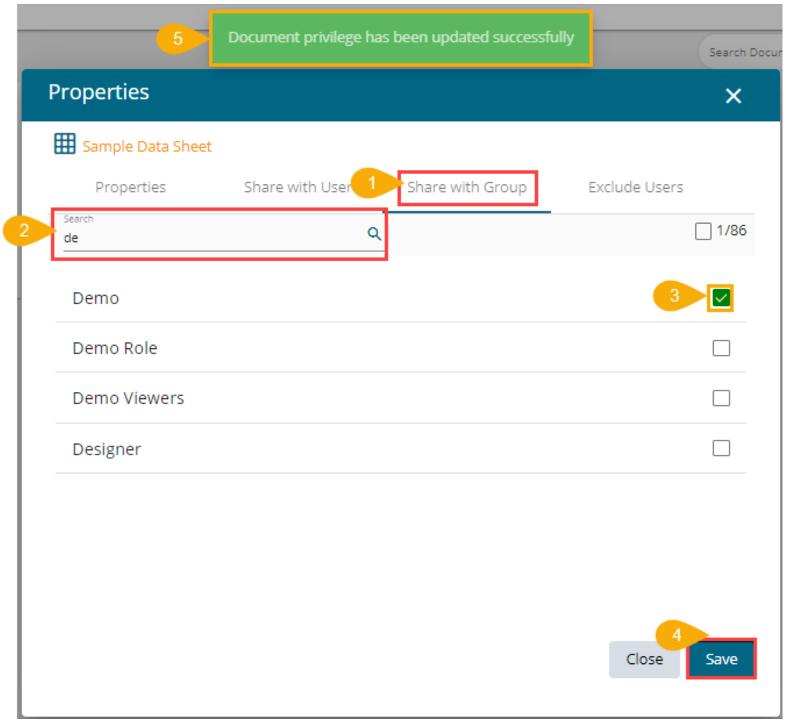
1. Select the '**Share with User**' tab.
2. Search for a specific user(s) using the search bar.
3. Select a user or multiple users by using the tick marks in the given box(es).
4. Click the '**Save**' option.
5. A success message appears, "Document privilege has been updated successfully".



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.

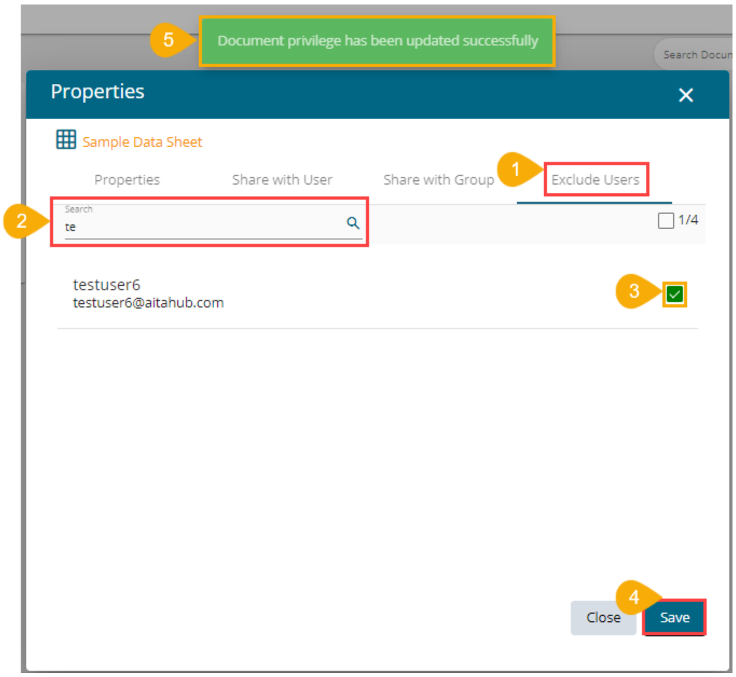
1. Select the '**Share with Group**' tab.
2. Search for a specific user(s) using the search bar.
3. Select a group or groups by using the tick marks in the given box(es).
4. Click the '**Save**' option.
5. A success message appears, "Document privilege has been updated successfully".



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".

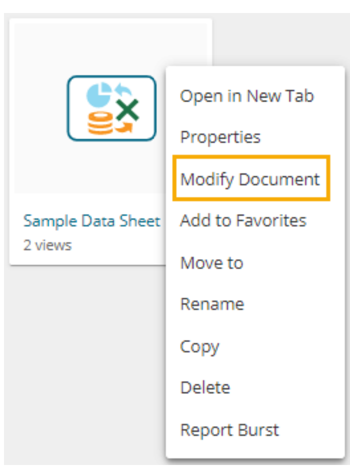


6. The selected user(s) get excluded from the privileges to access the Data Sheet.

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.

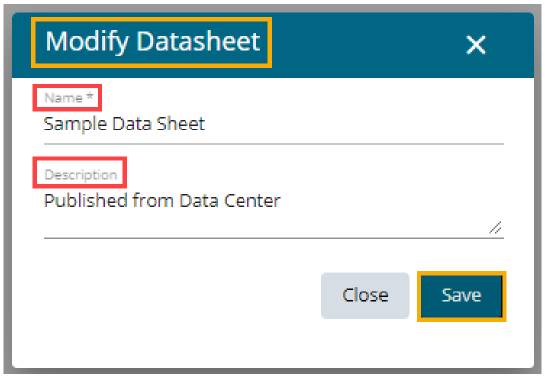


ii) The Modify Document Dialog window opens.

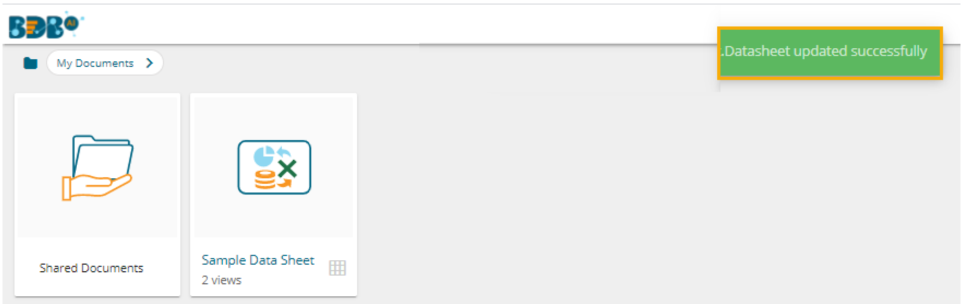
a. Modify the Data Sheet Name.

b. Modify the Data Sheet Description.

c. Click the '**Save**' option.



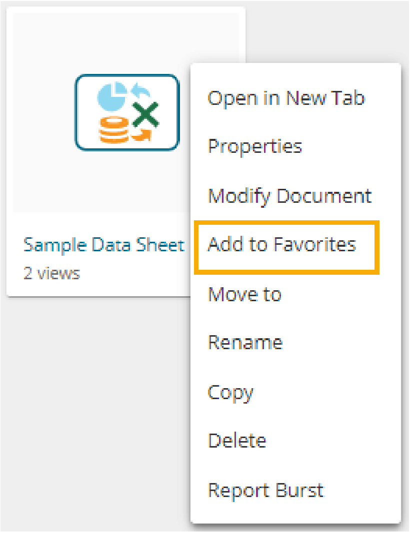
iii) A success message appears.



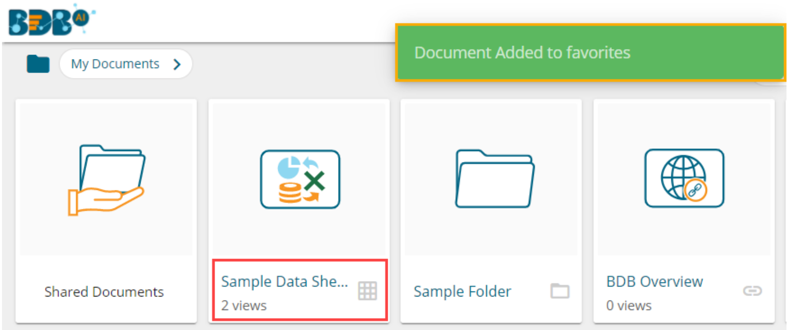
iv) The Data Sheet details gets modified.

7.6.4. Add to Favorites

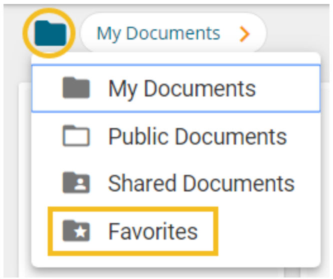
i) Select the '**Add to Favorite**' option from the Operations menu.



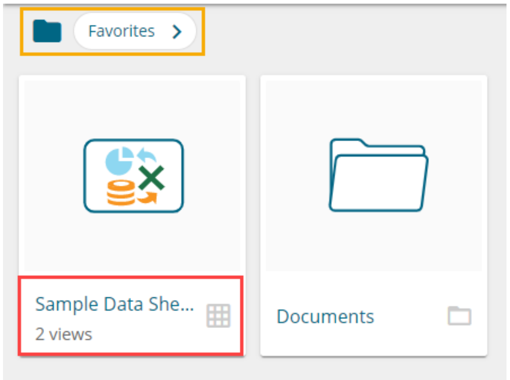
ii) A new message pops-up, "Document added to Favorites."



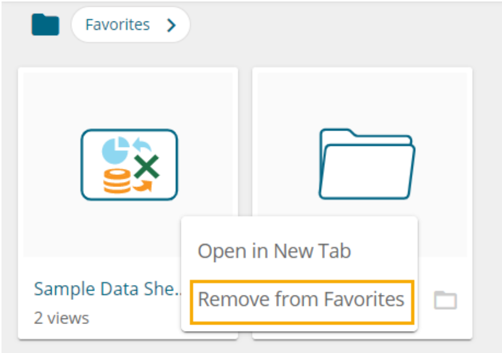
iii) Open '**Favorites**' using the '**My Document**' drop-down menu.



iv) The selected Data Sheet document gets added to the '**Favorites**' space.

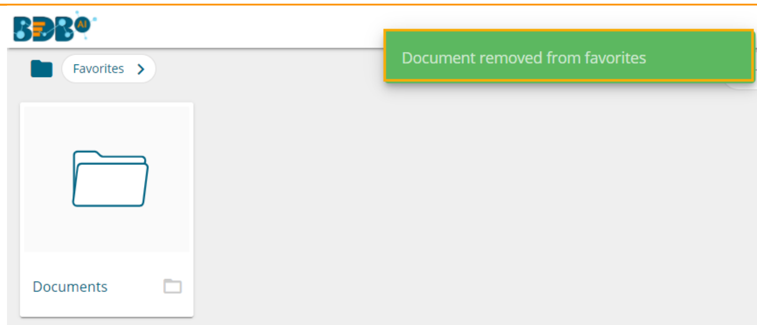


v) Click the '**Remove from Favorites**' option that appears by using a right-click on the Data Sheet document.



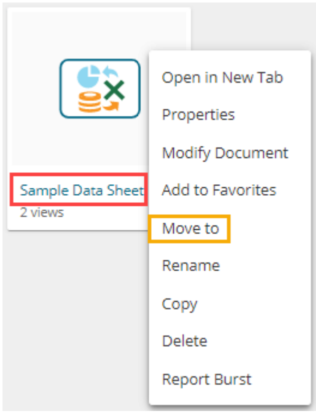
vi) A success message appears stating that the document got removed from the Favorites space.

vii) The selected Data Sheet gets removed from '**Favorites**.'



7.6.5. Move to

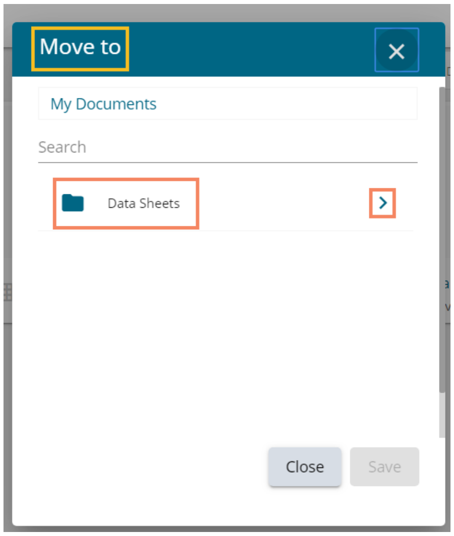
i) Click the ‘**Move to’** option from the operation context menu.



ii) The Move to window opens.

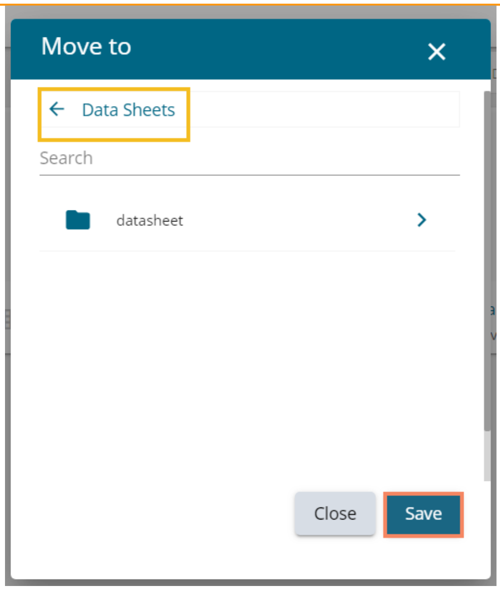
iii) Select a folder where you wish to move the Data Sheet.

iv) Click the ‘Move’ icon to move the Data Sheet.

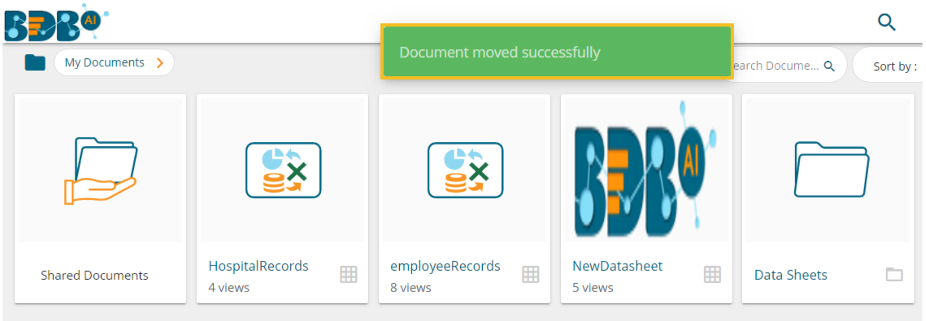


v) The next screen opens displaying the selected folder at the top.

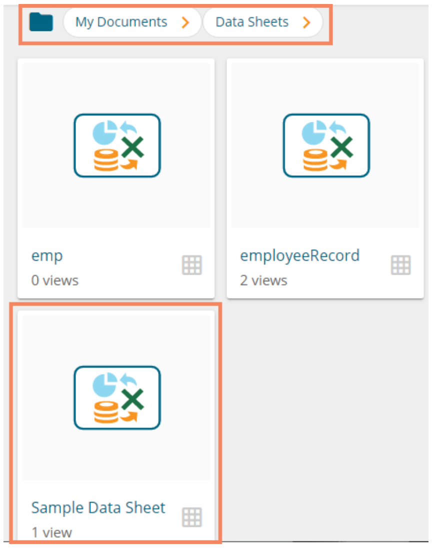
vi) Click the ‘**Save**’ option.



vii) A success message appears.



viii) The concerned Data Sheet gets moved to the selected folder.

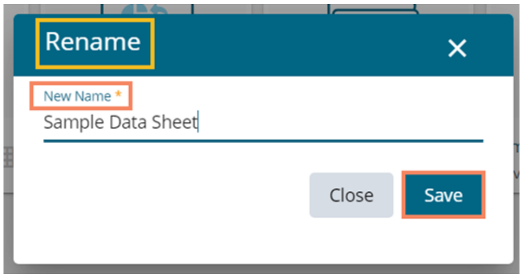


7.6.6. Rename

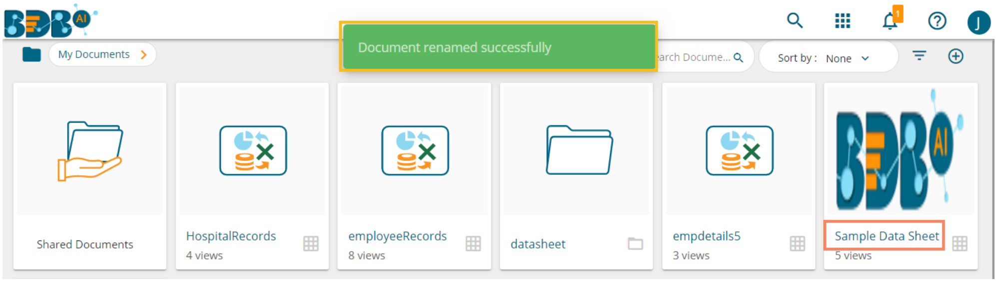
i) Click the '**Rename**' option from the Operations context menu.

ii) The Rename window opens.

iii) Provide a New Name for the Data Sheet.
iv) Click the '**Save**' option.

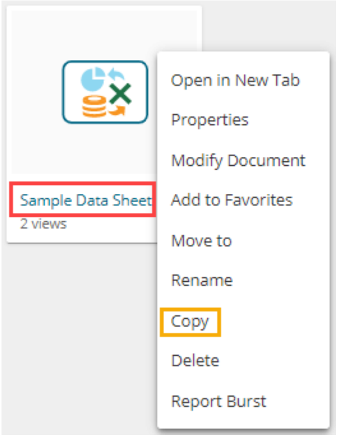


v) A success message appears.
vi) The Data Sheet gets renamed.

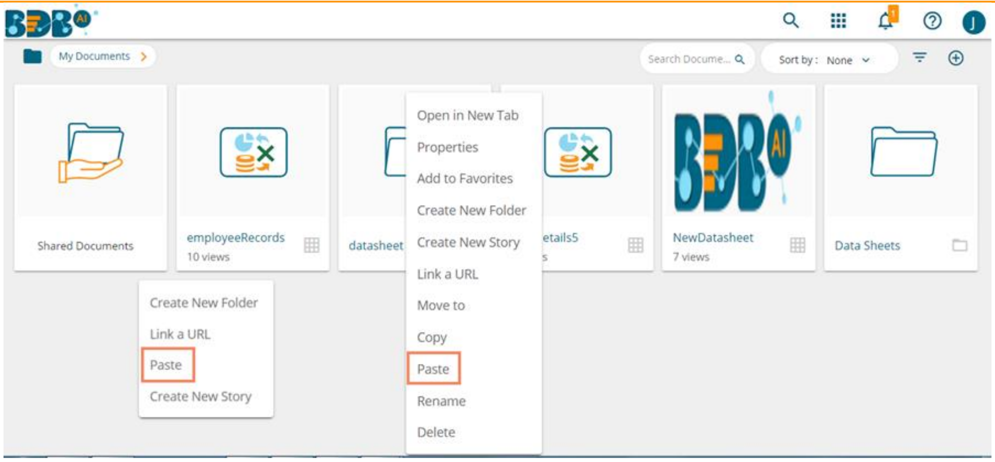


7.6.7. Copy

i) Click the '**Copy**' option from the Operations context menu.



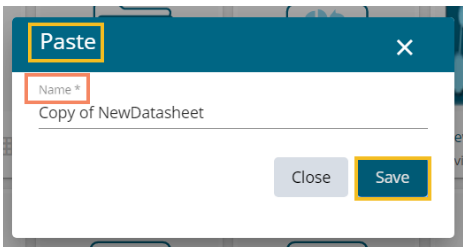
ii) Select a folder and use the right click to access the Paste option.
Or
Use right click at the blank space of '**My Documents**' or '**Public Documents**'.
iii) Click the '**Paste**' option.



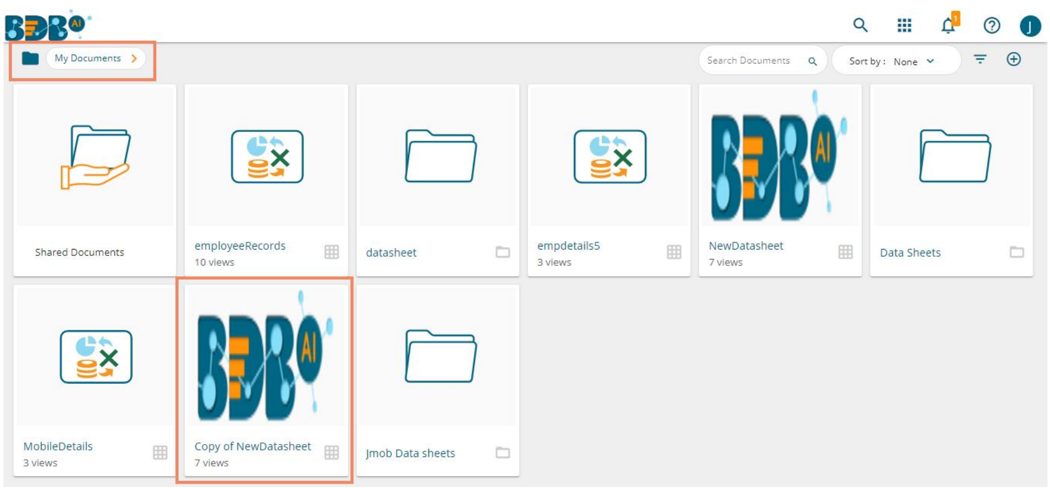
iv) The Paste window opens.

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.

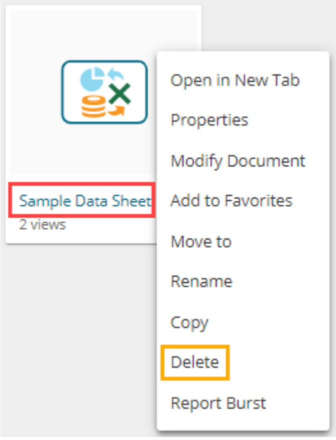


vii) The copied Data Sheet gets pasted to the selected space.



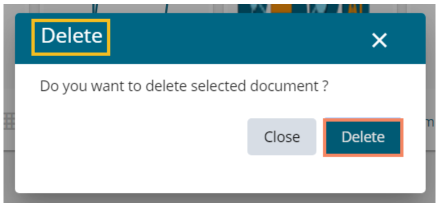
7.6.8. Delete

i) Click the ‘**Delete**’ option from the Context menu.

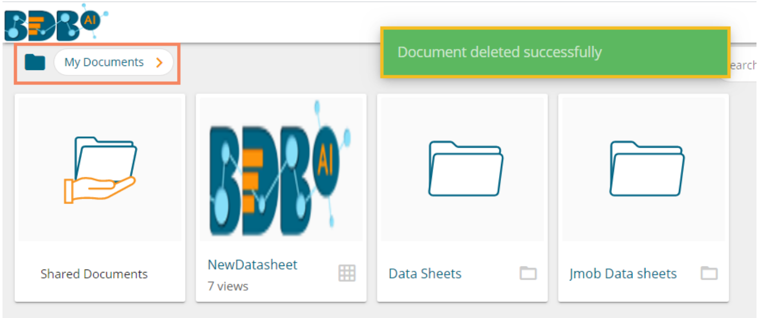


ii) The Delete window opens to confirm the action of deletion.

iii) Click the ‘**Delete**’ option.

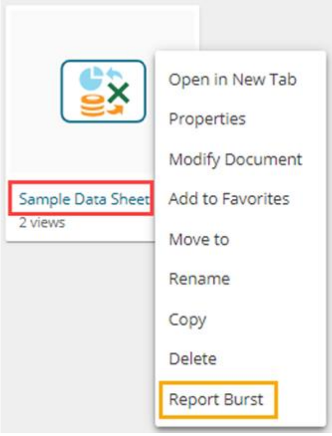


iv) A success message appears, and the selected Data Sheet gets removed.

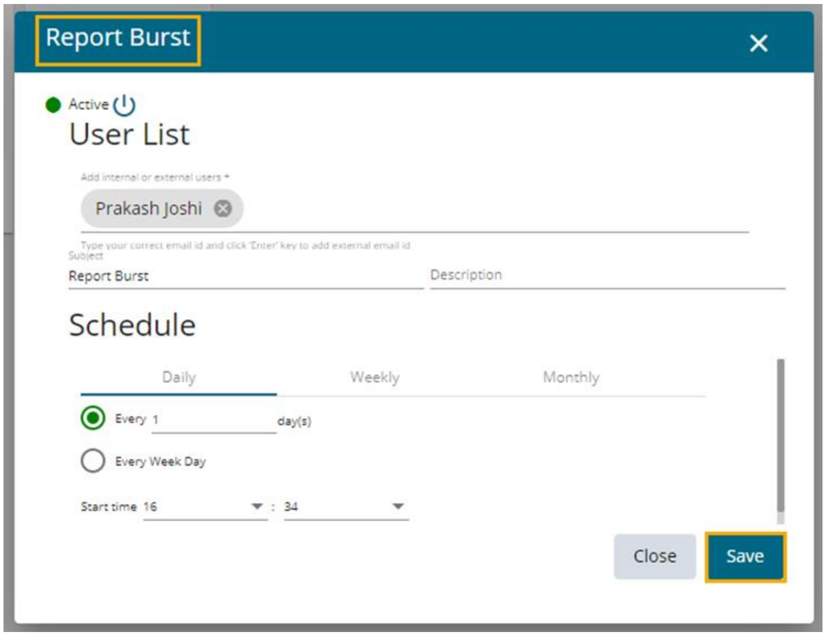


7.6.9. Report Burst

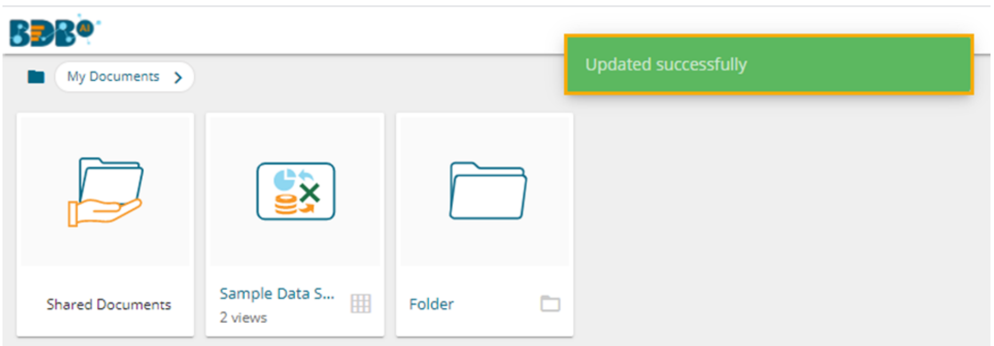
x) Select the ‘**Report Burst**’ option from the Data Sheet options menu.



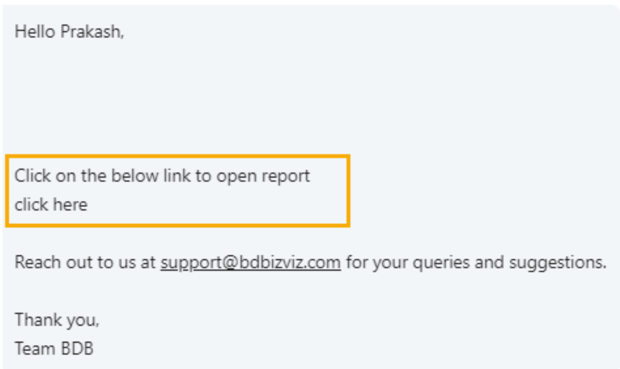
xi) The Report Burst window opens.
xii) Add the users or user groups.
xiii) Provide a subject.
xiv) Provide description (optional).
xv) Schedule the report.
xvi) Click the '**Save**' option.



xvii) A success message appears.

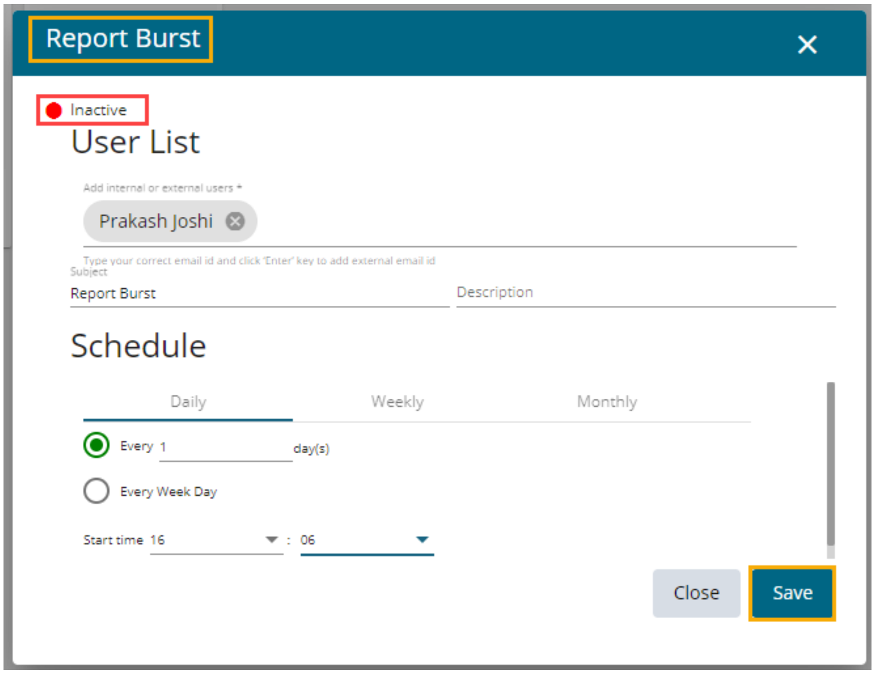


xviii) The open document link and PDF report get shared with the selected user(s)/ user group(s).

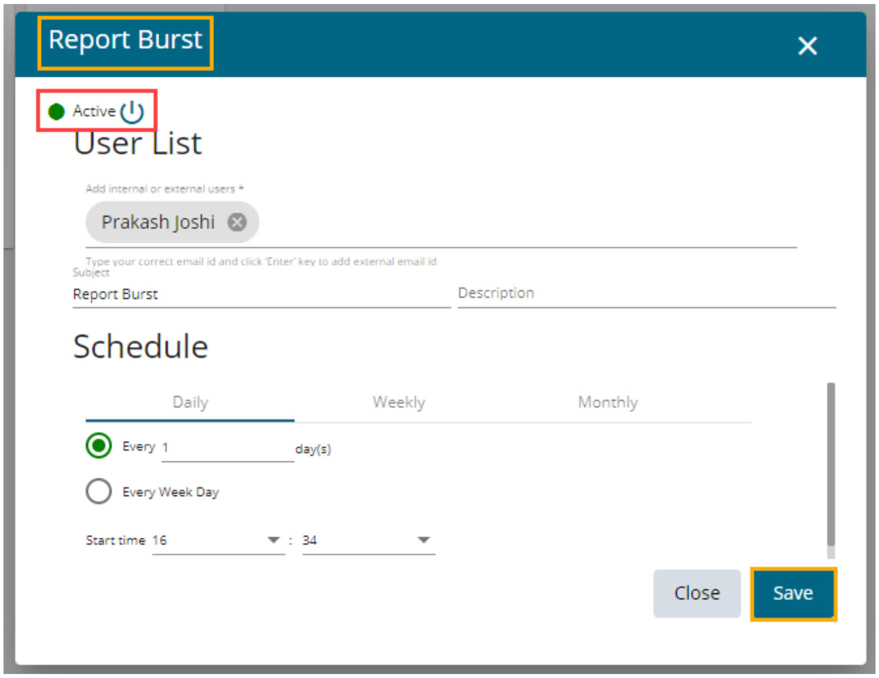


Note: To Stop the Scheduled Report Burst

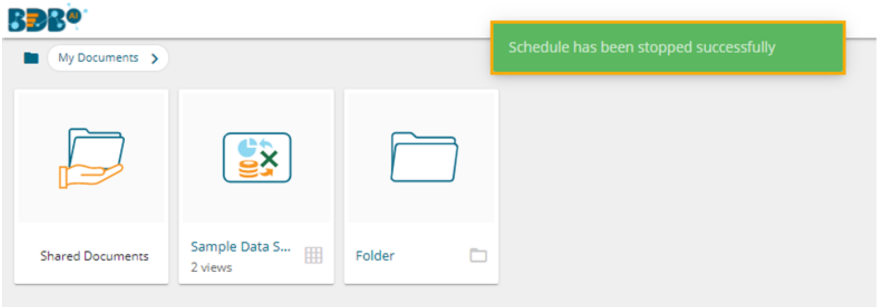
5. The Inactive button gets changed into the Active button after the report bursts details get saved.



6. Click the Active button.
7. Click the '**Save**' option.



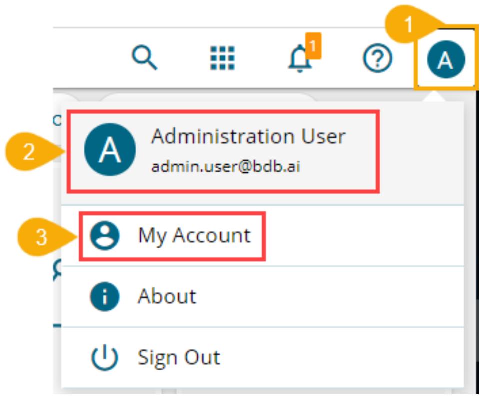
8. A success message appears to inform the user that the schedule has been stopped.



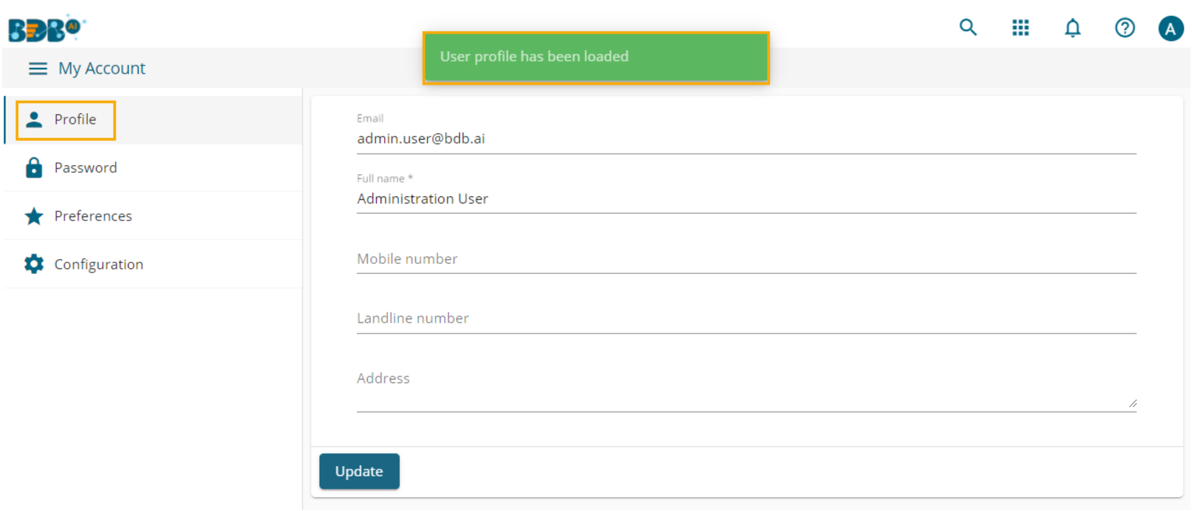
8. My Account

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.



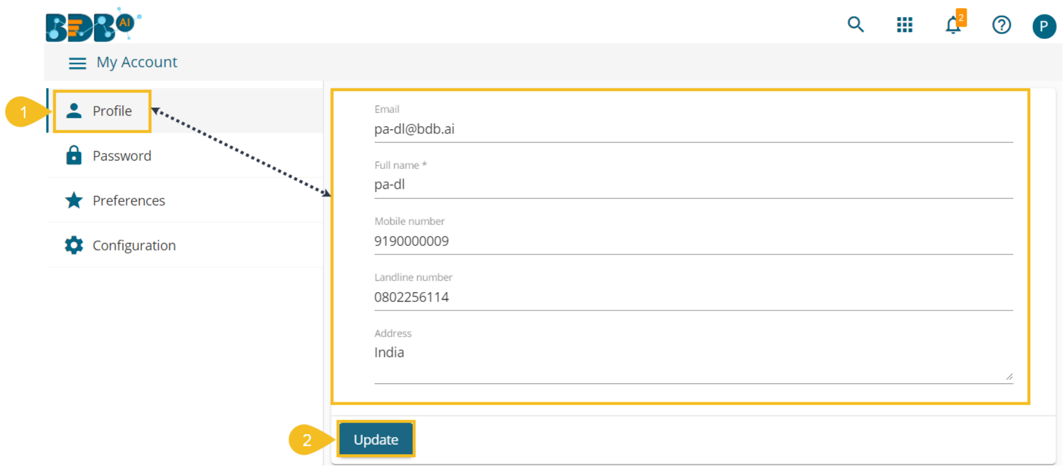
8.1. Profile

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.



iii) The profile changes get saved.

8.2. Password

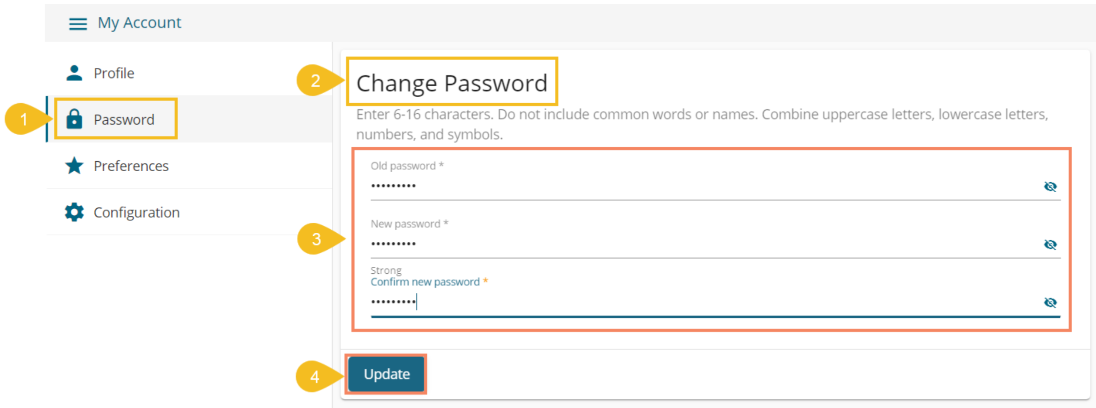
The user can reset the password for his account using this segment.

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.



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.

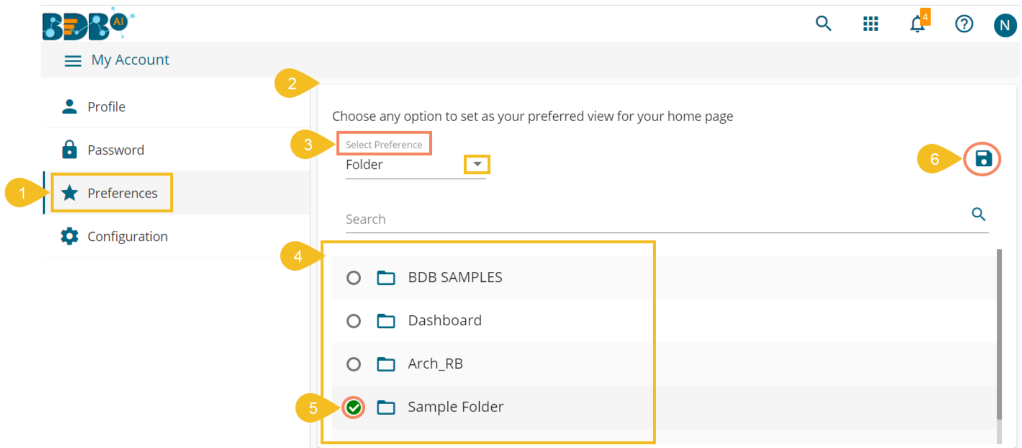
c. Shared- the user can set any document from the Shared folder as the preferred view for the homepage.

d. Default – it opens the My Documents page for the user as the default homepage.

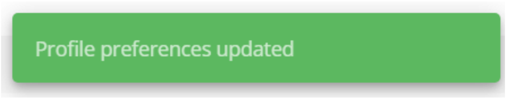
iv) As per the selected choice, a drop-down menu appears (E.g., The following image displays all the available folders since the '**Folder**' option is selected from the Select Preference drop-down).

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.



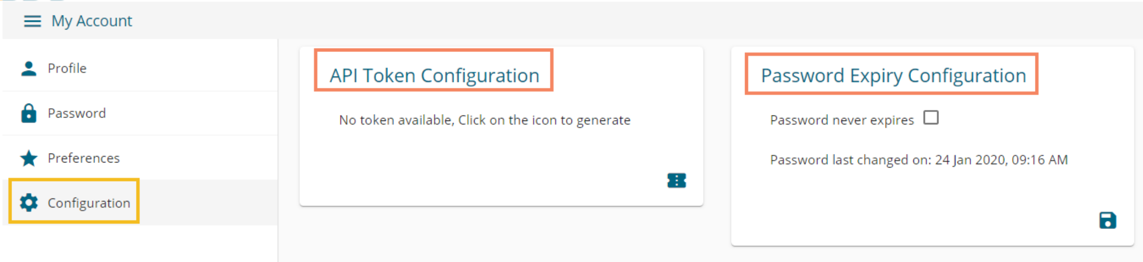
vii) A pop-up message appears to assure that the preferences have been updated.



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

8.4. Configuration

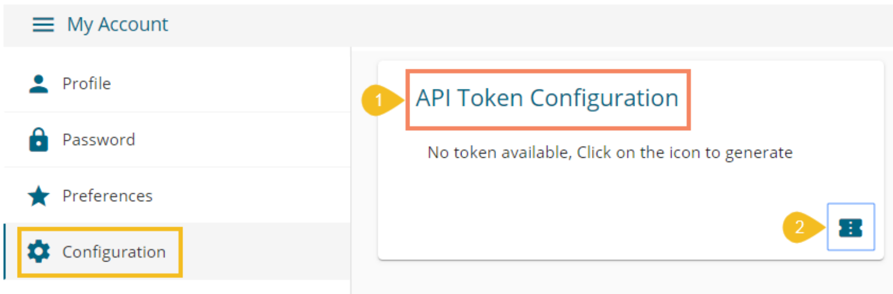
The configuration tab allows the user to create or reset the API Token and set the Password Expiry configuration.



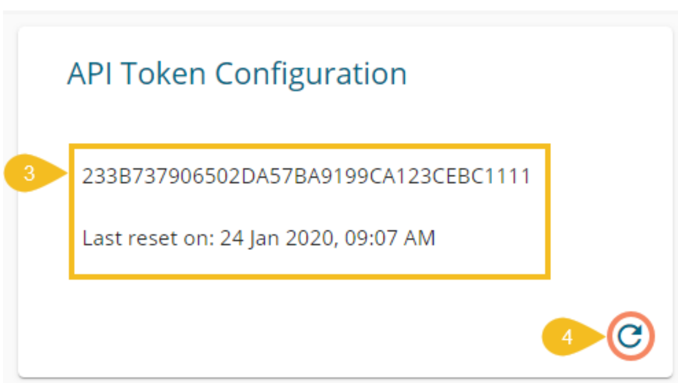
a. **API Token Configuration**

The API Token is used to expose the document as an open document.

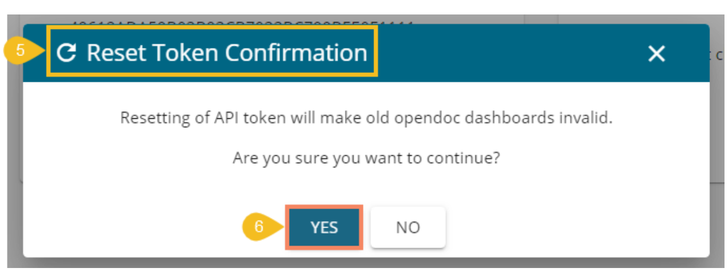
i) Navigate to the API Token Configuration option using the ‘**Configuration**’ tab.
ii) Click the ‘**Generate**’ icon to generate an API token.



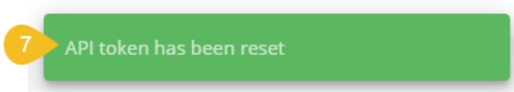
iii) The API token gets generated and displayed below with the mention of the last reset date and time.
iv) Click the ‘**Reset**’ icon to reset the API Token.



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.

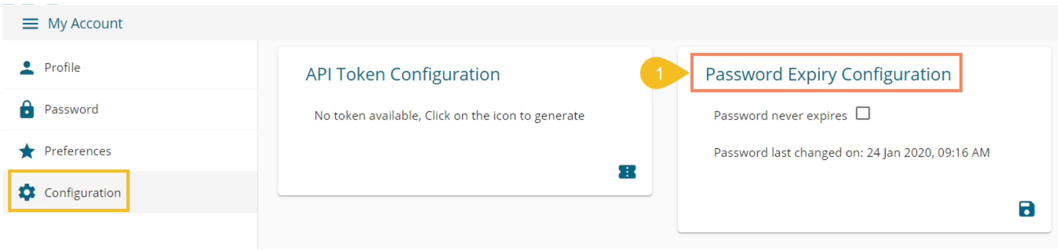


Note: The last reset date and time get mentioned under the API Token Configuration window.

b. Password Expiry Configuration

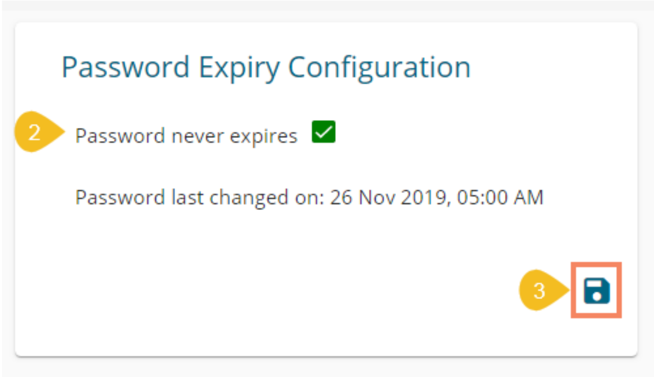
The password expiry limit can be configured via this option.

i. Navigate to the '**Password Expiry Configuration**' option using the '**Configuration**' tab.

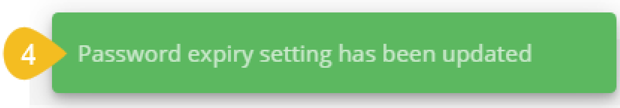


ii. Select the '**Password Never Expires**' option by putting a tick mark in the given box.

iii. Click the '**Apply Changes**' icon to save the changes.



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.

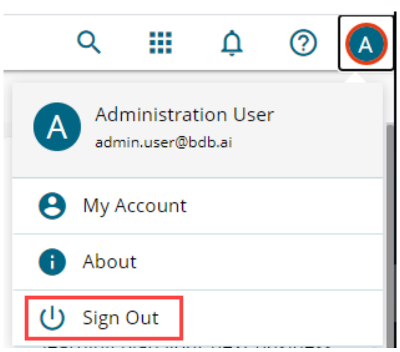
Note: The User can configure the AD or CA PPM authentication options through the Administration module.

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.



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.