

User Guide

Story R-6.0



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1. About this Guide

1.1. Document History

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

Product Version	Date (Release Date)	Description
Story 2.0	February 21 st , 2016	The first release of the document
Story 2.1 May 25 th , 2016		Updated document
Story 2.5	November 9 th , 2016	Updated document
Story 2.5.3	March 16 th , 2017	Updated document
Story 3.0	August 31 st , 2017	Updated document
Story 3.0	October 26 th , 2017	Modified document
Story 3.2	February 2 nd , 2018	Updated document
Story 3.5	April 15 ^{th,} 2018	Updated document
Story 3.5.1	July 5 th , 2018	Updated document
Story 3.6	August 20 th , 2018	Updated document
Story 3.7	October 10 th , 2018	Updated document
Story 3.8	December 1 st , 2018	Updated document
Story 4.0	December 31 st , 2018	Updated document
Story 4.2	March 25 th , 2019	Updated document
Story 4.3	April 24 th , 2019	Updated document
Story 4.4	June 7 th , 2019	Updated document
Story 4.5	August 5 th , 2019	Updated document
Story 4.6	November 15 th , 2019	Updated document
Story 5.0	February 17 th , 2020	Updated document
Story 5.2.0	August 21 st , 2020	Updated document
Story 6.0	February 26 th , 2021	Updated document

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

1.2. Overview

This guide covers:

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

1.3. Target Audience

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



2. Introducing Story

2.1. Introduction

The Story is an advanced data visualization feature of the BDB Platform. It helps the users to create rich, interactive data visualization to present complex, related data. The entire process of creating a story out of the selected data is easy, quick, and exciting. The users can choose a data source, 'drag and drop' the required values (Dimensions/Measures), and get promptly generated views based on the selected data values. Users can save relevant views on the storyboard to create their personalized stories.

2.2. Supported Web Browsers

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

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

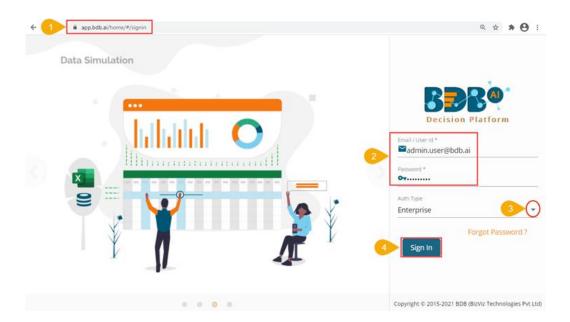
2.3. Prerequisites

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

3. Getting Started with Story

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

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



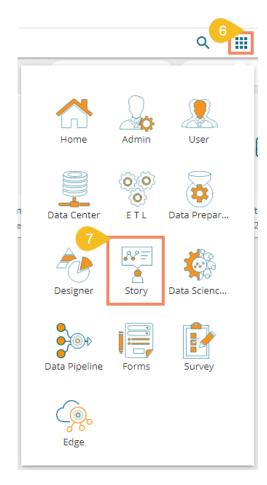


v) BDB Platform homepage opens.

My Documents			
Welcome to BDB Decision platform	Dashboard Designer	Business Story	Data Science Workbench
BDB is a complete decision platform for all your business needs. Drive from data to dynamic visuals and derive an actionable insight into your business data.	Design, save and publish a splendid governed dashboards. Display relevant KPIs through comprehensive and stunning visual reports to attain your business objectives.	Go beyond the classic BI with our ground-breaking self-service BI tool. Gain pertinent insights into your business by creating wide-ranging views on your own without external IT help.	Let the power of advanced statistical analysis and machine learning plan your next business move. Access and apply accurate and customizable Predictive mode to maximize future opportunities.
Avail 360° view of your business by assembling, processing, and analyzing the acquired data. Access incomparable analytics at	Data Center	© © ETL	Data Preparation
any time from anywhere on any device.	Supports a wide range of Data sources starting from the spreadsheets in your system to a cloud-based database. Establish connections to these data sources	A self-driven Data Wrangling tool to extract data from diverse sources, including the merged data. Enforce data quality and consistency standards to deliver the output in a	Experience a secure yet self-driven mode of data preparation. Streamline the entire process of dealing with retrievable business data empowering the business
Version: 6.0.0	and build Data Sets or Data Stores	presentation-ready format.	users to decide with unprecedente agility.

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

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





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

OR

Right-click anywhere on the My Documents or Public Documents blank space to get the context menu.

OR

Click the Options icon to open the context menu.

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

My Documents >				Se	earch Docume Q	Sort by :	Name V	6 🕀
Create New Folde Link a URL Create New Story)			°C	Create New F	_
Shared Documents	Folders	New Folder		Published Dashbo	Story 18 views	~	Story 8 views	~

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

8 Crea	ate New Story	×
9 Name * Story]	
10 Descr	iption	
		11 Close Save
		Sidde Save

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

BBB®		C	ર 🏢	🗘 🕐 🚺		
My Documents > Story :				Ξ 0		
Click on a data store to start analyzing						
Search Q						
gs nlp hiring	Simple Drag and Drop	View and Story level	Integ	gration with R for		
🍃 jira nlp						edictive Insights
gs blankval	design a View and build analytical visual reports	level) and 'Global' (story level) filters for altered	con	ing the R Scripting nponent that brings		
mysql_3.8_dstore	within a few minutes.	visual insights.		dictive insights into		
🍔 gs trans 1lakh		Al Seech Q				
ALLDataType_24Oct				¥((
Se dstore1	Automatic Data Insights	Intuitive Al-based	Use	er Friendly Voice		
🛢 mysql nlp	It uses machine learning	Search BDB's Al-based Search		Search		

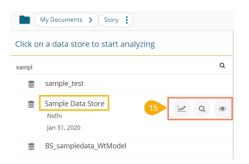
www.bdb.ai



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

13 My Documents >		4	Searc
Shared Documents	Filter Saver Dashb 🐢 2 views	Documents	Story 📈 1 view

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



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

My Documents > Story	/ !							8
Sample Data Store	Untitled	1	Dimensions / Measures [Drag and Drop Dimension or Measure Here	Slicer [Drag and Drop Dimension Here 1	Chart	Properties		H
Search Dimensions / Measures Q	Summary	\$		Dimension Here 1 Hidden [Drag and Drop Dimension Here 1			F	¢;
Abc source i						al	\bowtie	
Abc skills i Abc previous_organisati i			Welcome Adminuser!	-	¢	4X		+
Abo team i Abo name i			The tour of the Designing Workspac guides you through all the steps in o		*	0000		8
Abc current_status i			a new view.	d tour	=%		⊒ ‰	
Abo referral_of i		[Select	Dimension or Measure to Visua	alize Data]				
Abe expected_joining_d i		[Cha	ange chart from right hand side	panel]	A.C.			
123 usd_billing 123 experience_Year								

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



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

My Documents > Story			■ 0
Data Search		Sampl	le Data Store 🛢 i 💡 🗙
Search suggestions		Data store information	Search Dimensions / Measu
Q Mean Of The Monthlysalary	Welcome, Adminuser!		
Q mean of the Monthlysalary	The guided tour of Data Search page points out the key options provided for the	Abe gender	123 usd_billing
Q Mean of Monthlysalary by Team where skill is Selenium and		Abc SOURCE	123 experience_Year
Qaarchitect	« Prev Next » End tour	Abo skills	123 candidate_id
Q mean of monthlysalary	« FIEV Next » End tour	Abe previous_organisation	123 id
Q sum Offeredctc		Abc team	123 offered_ctc
${f Q}$ Mean of Monthlysalary by Team where skill is Selenium		Ale name	123 previous_ctc
Q Mean of Monthlysalary by Team where skill is Selenium,mar	nagement	Abc current_status	123 expyrsper_ctc
		Abs designation	123 monthly_salary
		Ame referral_of	123 cur_monthly_payment
		Abc joining_status	123 PredictedValues1

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

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

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

My Documents >	Story :					Q 0
Basic Insights Time	e insights					
amole Data Store	Basic Insights: Skills by	MonthlyS *				,
PreviousOrganisation ExperienceCategory	15% 2% 3%	values acr	Dimension with 30 unique oss 223 rows(100%). The mon is Selenium (26%) and	4M Total M Seleniur	onthlySalary By	64K Average MonthlySalary By Selenium
 Designation Month Skills 	4%-5%-5%-23%	the next c	ommon is Java (23%).	0	Ø	Ø 208K
Team	13%			Min Mor Seleniur	nthlySalary By m	Max MonthlySalary By Selenium
 Comments ReferralOf 	Top 5 Skills By Total MonthlySalary	Ø	Top 5 Skills By Average MonthlySalary	Ø	Top 5 Skills By Maximum Monthly5	diatery di
Source						

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

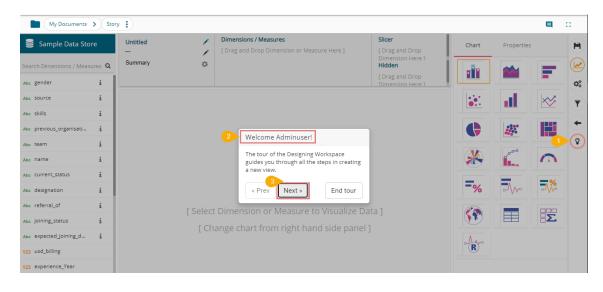
Note: By clicking the 'Close Insights' 🗮 icon, the user gets the Storyboard screen.

3.1. Guided Tour

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



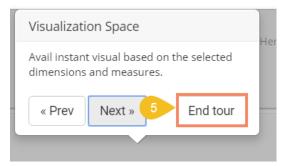
- 1. The users need to click the '**Start Tour**' 💟 icon to begin the guided tour for an existing Business Story. (The Guided tour window opens by default for a newly created Business Story.)
- 2. The user gets a dialog window prompting to lead them through all the significant functionality provided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



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

🛢 Sample Data Store		Untitled	1	Dimensions .
			"	[Drag and D
Search Dimensions / Measure	es Q	Summary	¢	1
Abc Name	i			
Abc Gender	i			
Abc Source	i	Dimensions/Meas	uros List	
Abc ReferralOf	i			
Abc Designation	i	Displays all the availate measures from the d		ions and
Abc Team	i 4	« Prev Next »		End tour
Abc PreviousOrganisation	i	« FIEV		
Abc Skills	i			
Abc Month	i	[Sele	ect Dime	ension or N
ALL DATA STORE	f_x	[(Change	chart from

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





Note:

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

4. Data Insights

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

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

	My Documents > Story	
Click o	n a data store to start analyzing	
sampl		Q
0)))	sample_test	
()))	Sample Data Store Nidhi Jan 31, 2020	₩ Q 📀
•)))	BS_sampledata_WtModel	

- iv) The following page opens if the Data Insights are not generated for the concerned Data Store.
- v) The user needs to click the 'Click Here to Generate Insights' option to get automated insights for the concerned data store.

My Documents > Stor	y !)		0
Basic Insights			
Sample Data Store 🗸 🗸			×
		Close	e Insights
	Automated insights are not available for this Data Store.		
	Click Here To Generate Insights		

vi) A message appears to notify that the insights generation process started.

Insight generation process started



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

My Documents 🕥 Story 🚦							
Basic Insights Time Insights							
Sample Data Store 👻	Basic Insights: Designation by	monthly_salary 🔻					×
An designation An skills An source	15% 25 3% 3%		with 36 unique values across 224 mon is Senior Software Engineer(33%) and re Engineer(13%).	6M Total monthl Senior Softw		79K Average monthly_salary Bu Saniar Softwara	۲
An team An referral_of An current_status An joining_status	4%- 5%- 5%- 13%			0 Min monthly, Sanior Softw		208K Max monthly_salary By Saniry Softwara	۲
	Top 5 designation By Total monthly_salary		Top 5 designation by Average monthly_salary	۲	200K	blary 196 2394 2004 Inc. Senor. Lead Bo.	Ø

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

a. Changing Dimension Selection

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

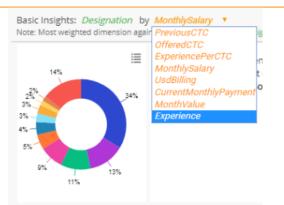
E.g., The following image displays a change in the data insights based on the selection of a new dimension. The image shows data from various perspectives based on a combination of 'Designation' and 'MonthlySalary'.

My Documents > Story								0
Basic Insights Time Insights								
Sample Data Store 🗸	Basic Insights: Designation by Note: Most weighted dimension agains		n.					×
An PreviousOrganisation An ExperienceCategory An Designation	14% 25% 35% 35%		with 35 unique values across 223 mon is Senior Software Engineer(34%) and re Engineer(13%).	6M Total Month Software En	ySalary By Senior	79K Average MonthlySalary By Saniar Softwara Enninear	Ø	
Ann Month Ann Skills Ann Team Ann Comments	45-05-135			0 Min Monthly Software En	Salary By Senior	208K Max MonthlySalary By Senior Software Engineer	Ø	
m ReferatOf m Source m joinningStatus m CurrentStatus m Year	Top 5 Designation By Total MonthlySalary	073X 005K	Top 5 Designation by Average MonthlySalary 400K 200K 200K 200K 200K 200K 200K 200K	87K	Top 5 Designation By Maximum MonthlySa 400K 300K 200K 100K Senor Dex. Senior An	ary 23% 23% 20% the factor of the factor of	Q	۲

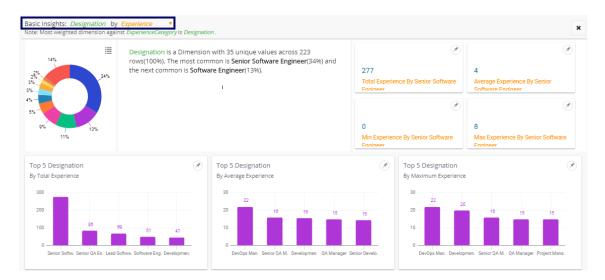
b. Changing Measure Selection

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





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



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

5. Data Search

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



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

		My Documents > Stor	ry i)	
C	lick o	n a data store to st	art analyzing	
sa	ample d	ata store		۹
		Sample Data Store		
	0)))	Sample Data Store N	Meta Data	
	0)))	Sample Data Store	W Q	()
		William Martin		
		Mar 23, 2021		

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

My Documents > Story			■ 0
Data Search		Sampl	e Data Store 🛢 i 💡 🗙
Search suggestions		Data store information	Search Dimensions / Measu
		Alle Name	123 CandidateId
	Welcome, Adminuser!	Abc Gender	123 MonthValue
	The guided tour of Data Search page points	Abc Source	123 Year 123 Experience
	out the key options provided for the conversational analytics.	Abe Designation	123 PreviousCTC
	« Prev Next » End tour	Abc Team	123 OfferedCTC
		Ame PreviousOrganisation	123 ExperiencePerCTC
		Alle Skills	123 MonthlySalary
		Alle Month	123 UsdBilling
		Aller JoinningStatus	123 CurrentMonthlyPayment

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

sum of	×	Q Sample D	ata Store	i የ 🛪
sum of usd_billing and sum of monthly_salary		*		*
sum of monthly_salary		17M sum of monthly_salary	321K max of mont	hly_salary
sum of monthly_salary where skills is selenium and designation is qa engineer		*		*
sum of monthly_salary where designation is qa engineer		75K	0	
		mean of monthly_salary	min of month	hly_salary
		Omitted keywords: • mean		

vii) After typing a specific query or selecting a search query from the search suggestions, click the 'Search' $^{\circ}$ icon.



mean of monthly salary | X

- viii) The search result instantly reflects beneath the search bar.
- ix) Click the 'Add to story' 🗡 icon.

sum of monthly salary	×	Sample Da	ta Store 🛢 i 💡
sum of Monthly_salary	Ů 🖉	*	*
Measure	Total	17M sum of monthly_salary	321K max of monthly_salary
sum(monthly_salary)	16.70M	*	*
		75K mean of monthly_salary	0 min of monthly_salary

x) A notification message appears.

sum of monthly salary	×	Sample Da	ata Store 🛢 i 💡 🗙
0			
sum of Monthly_salary	16 🗡	*	*
Measure	Total	17M sum of monthly_salary	321K max of monthly_salary
sum(monthly_salary)	16.70M		
		*	*
		75K mean of monthly_salary	0 min of monthly_salary
		View a	added to story

xi) The selected view gets added to the storyboard.

My Documents	> Story :	Ę	
n(1		
asure	Total		
m(monthly_salary)	16.70M		

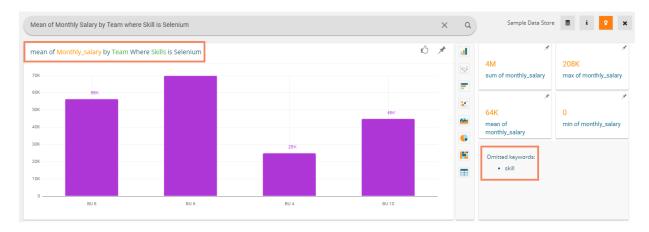
xii) The user can drill deeper into the selected Data Store by using the BDB Search bar with proper data queries.
 Refer to the following images to see how instantly the searched data gets displayed with more profound queries:

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

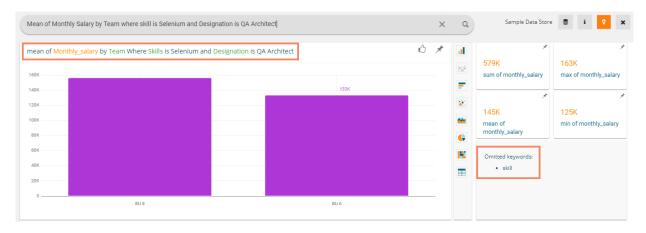




Query 2: 'Mean of Monthly Salary by Team where Skill is Selenium' - Displays team-wise monthly salary for those employees having Selenium skills



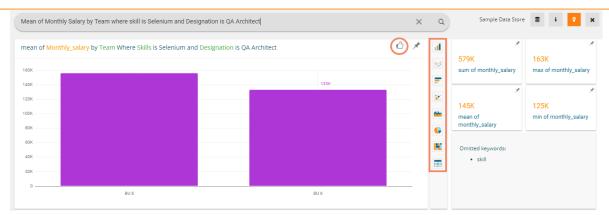
Query 3: 'Mean of Monthly Salary by Team where skill is Selenium and Designation is QA Architect' – Displays team-wise records of QA Architects' monthly salary who know Selenium



Note:

- a. The instantly created view gets displayed in a default charting component based on the inserted search query, users can switch to any other visualization option using the charting panel provided on the search page.
- b. Click the 'Like' 📫 icon to save the searched query into the database.





c. Click the 'Search suggestions' i icon to display all the saved search suggestions from the database along with a list of dimensions and Measures from the selected Data Store.

mean of monthly salary by team where skill is selenium and designation is qa architect	x q	Sample Data Store
Search suggestions	Data store information	Search Dimensions / Measures
Q sum of monthly salary	Me gender	123 usd_billing
Q mean of monthly salary by team	-	
Q mean of monthly salary by team where skill is selenium	Att source	123 experience_Year
Q mean of monthly salary by team where skill is selenium and designation is qa architect	Abc skills	123 candidate_id
	Abs previous_organisation	123 id
	Abc team	123 offered_ctc
	Alw name	123 previous_ctc
	Ale current_status	123 expyrsper_ctc
	Abs designation	123 monthly_salary
	Abs referral_of	123 cur_monthly_payment
	Alle joining_status	

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

mean of monthly sala	ary by team where skill is selenium and	designation is qa architect		×	Sample Data Store	≣ i የ x
mean of Monthly_sa 160k 140k 120k 120k 1000k 80k 60k 40k 20k 20k		n and Designation is QA Architect U 8 Mean(monthly_salary) 156,250	133%		sum of monthly_salary	163K max of monthly_salary 125K min of monthly_salary
	BU 8		BU 6			

- e. Users can alter the data store by using the Data Store sicon provided on the Data Search page. The users get two choices to choose from:
 - 1) Displays the selected Data Store- to continue with the selected Data Store (in the given case, it is 'Sample Data Store')
 - 2) Show more- to select another Data Store from the list of available Data Stores.





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

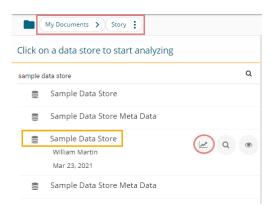
	ry 🚦			9	0
: Total	Mean(monthly_salary) By team	¢	I		(
16.70M	200K	156K			
	100K				C
	50К 0				
	BU 6	BU 8			•
	: Total 16.70M	Total By team 16.70M 200K 150K 133K 100K 50K	Total By team 16.70M 200K 150K 133K 150K 0	Total By team 16.70M 200K 150K 133K 150K 0	Total By team 16.70M 200K 150K 133K 150K 0

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

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

6. Designing a New View

This section explains the steps to create a new view using the drag-drop interface provided on the Design page.i) Select the 'View Design' icon after selecting a data store.





ii) The Design workspace opens displaying the guided tour dialog window.

My Documents > Sta	ry 🚦								E	0
🛢 Sample Data Store	Untitled 	1		sions / Measures and Drop Dimension or Measure Here]		i cer Drag and Drop	Chart	Properties		F
Search Dimensions / Measures Q	Summary	\$			Hi	mension Here 1 dden Drag and Drop				Ŀ
Abc Name i Abc Gender i						mension Here 1		al		
Abc Source i										
Abc ReferralOf i Abc Designation i				Welcome Adminuser!						
Abc Team i				The tour of the Designing Workspace guides you through all the steps in cre a new view.	ating		×	1	\frown	
Abc PreviousOrganisation 1 Abc Skills				« Prev Next » End to	our		=%	~ //~		
Abc Month		[Select	: Dime	nsion or Measure to Visuali	ize Data]				Σ	
Abc JoinningStatus i		[Ch	ange o	hart from right hand side p:	anel]					
Abc ExperienceCategory							R			
Abc Comments										
ALL DATA STORE f_r										

- iii) After completing the guided tour or ending the tour, the user gets access of the Design workspace.
- iv) The **Design** workspace opens to design a new view.
 - i. The name of the selected Data Store appears on the left side of the screen.
 - ii. A list of available Dimensions and Measures in the selected Data Store get listed below the Data Store name.
 - iii. Select another Data Store by clicking the 'ALL DATA STORE' option.
 - iv. All the available Charts and chart specific Properties get displayed on the right side.
 - v. The user also gets a panel to drag the dimensions and measures and the instant visualization appears below.

My Documents > Story	•						E	0
Sample Data Store	Untitled 	1	Dimensions / Measures [Drag and Drop Dimension or Measure Here]	Slicer [Drag and Drop Dimension Here 1	Chart	Properties		Ĥ
Search Dimensions / Measures Q	Summary	\$		Imension Here I Hidden Drag and Drop Dimension Here 1			F	¢
Abc Gender i						ы	~~	T
Abc ReferralOf i			- 7		•	49. 1		•
Abc Team i					×	000		
Abc Skills i					=%	• // /••	₹%	
Abc Month i			Dimension or Measure to Visualize I ange chart from right hand side pane	-			- Σ	
Abc CurrentStatus i					R			
Abc Comments i ALL DATA STORE f_X								

- v) Drag and drop the required dimensions/measures from the data store (As displayed in the below image).
- vi) A View (graphical view) based on the selected dimensions/measures instantly appears on the canvas (The Mixed chart type gets selected by default).
- vii) Click the **'Save'** 💾 icon.



h Dimension / Messure Q icomments i iscretectedjoinningDa i andidaeedd MontYvalue ear reviousCTC C	Sample Data Store	Sum(MonthlySalary) 📝 By Team	Dimensions / Measures	Slicer [Drag and Drop	Chart	Properties	
SizpercedjoiningDa i SillSartDare i AM AM </th <th></th> <th>-</th> <th>- I and and and and and a set</th> <th>Hidden [Drag and Drop</th> <th></th> <th></th> <th>F</th>		-	- I and and and and and a set	Hidden [Drag and Drop			F
ill Sandidateld And AndrivAule Saperience Seperie			And the second se			.1	\sim
American Constraint American Constraint American Constraint American Constraint American Constraint Image: Constraint Imag						45	
rear 3M 2M 1M 7% 1M sixperience 2M 1M 1M 1M 1M sixperiencePerCTC 2M 1M 1M 1M sixperiencePerCTC 1M 756K 655K 665K 749K Jadbilling 500K 500K 347K 347K	MonthValue						
ixperience 2M *reviousCTC 2M OfferedCTC 2M ixperiencePerCTC 1M MonthlySalary 500K stopeling 500K	Year	3M				la	<i>x</i> + x
OfferedCTC 2M 1M Image: Signer George CTC Image: Signe: Signer George CTC Image: Signe: Si	xperience		2M				⊒ ‰
SxperiencePerCTC 1M 756K 655K 662K 7.49K MonthlySalary 500K 347K 347K	PreviousCTC	2M					
MonthlySalary 1M 758K 653K 665K 662K 749K Jadbilling 500K 347K 347K 347K	OfferedCTC	2M	1M		\$		Σ
JsdBilling		1M —	756K 638K 665K 662K	749K	Ano		
	IsdBilling	500K			K		

- viii) A new view gets created successfully.
- ix) The newly created view gets saved on the Storyboard.
- x) The users need to click the '**Save**' H option from the Storyboard.

My Documents > Story	Ξ. ::
um(MonthlySalary) 🔶 🗄	
/ Team	
5M 4M	
4M 3M 2M 2M 2M	
2M1M	
BU 4 BU 6 BU 7 BU . BU 8 BU . BU 2 BU 1 BU 9 BU 5 BU .	

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

My Documents > Story	
sum(MonthlySalary) 🗢 🗧	((
y Team	4
SM	
AM AM 3M 2M	
244 1M 1M 756K _{633K665K62K749K} 347X 25K	¢
BU 4 BU 6 BU 7 BU . BU 8 BU . BU 2 BU 1 BU 9 BU 5 BU .	
	3
	*
	(1
	(1
	Story Saved Successfully



Note:

a. If users move to Storyboard without saving the newly designed view, a pop-up window appears to confirm whether the changes for the View need to be saved to the story or not. Click '**YES**' using the message window to save the view changes.



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



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

3 Category I	Properties: Team 🛛 🗙	
4 Display Name	Teams	_
2		
	CANCEL 5 APPLY	3



6.1. Dimension Profiling

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

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

🔰 Sample Data Sto	ore
Search Dimensions / Mea	sures Q
Abc Name	i
Abc Gender	i
Abc SOURCE	i
Abc ReferralOf	i
Abc Designation	í
Abc Team	i
Abc PreviousOrganisation	i
Abc Skills	i
Abc Month	i
ALL DATA STORE	f_x

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

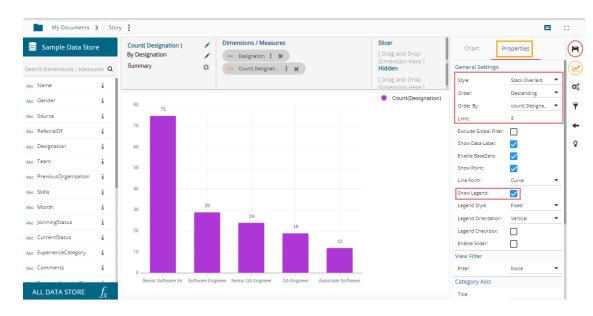


iv) The data profile chart gets moved to the design workspace.

Sample Data Store	Count(designation) By designation Summary	/ / ¢		ation : ×	¢	[]	idden Drag and Dr imension He	
Abo gender i								
Abc SOURCE i	Senior Software Engineer Software Engineer Senior QA Engineer			29 29			75	
Abc Skills i	Associate Software Engineer Associate QA Engineer Lead Software Engineer Sr Software Developer	7	10 ¹²					
Abc previous_organisati i	OA Architect Sr OA Engineer Development Mahager Sr Big Data Developer Sr Big Data Scriegtist	34						
Abc team i	Project Manager SP BL Developer AWS Consultant Analytics Manager	3						
Abo name i	Business Analyst Data Architect DevOps Engineer DevOps Mahager							
Abo current_status i	Lead Bi Developer Lead QA Engineer Operation Analyst							
Abc designation i	OA Manage RFP Analys Senior Architect Senior Development Manager							
Abc referral_of i	Solution Specialist Solution Specialist Technical Architect IOS Developer							
ALL DATA STORE f_r	0	1	0 20	30 40	50	60	70	80



 v) The user can apply the various modification options to the view from the Design page (E.g., The below given image displays the modified view after applying the descending order and limiting the display to 5 records. It also displays legend).



vi) Click the 'Save' 🛄 option from the Design Workspace.

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



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

6.2. Data Store Merge at View Level

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

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



student_library		Sum(Stud By Subject Summary	entNumber) Name		mensions /			Slicer [Drag and Drop Dimension Here 1 Hidden	Chart	Propertie	
SubjectName	i							[Drag and Drop Dimension Here 1			-
SubjectId	i	500	478							al	\sim
Date	i	450			153						
StudentNumber		400				414	372	417		25	
		350							×	000	
		300									
		250							-%	~/\/~	₹%
		200		_							
		150		_					S		Σ
		100		_					R		
		50		_		_			(R)		
		0									

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

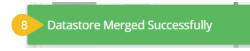
	asures Q	Summary	Data Store		
Abc SubjectName	i		stu	4	
Abc SubjectId	i	500			
Abc Date	i	400	Ajith: Student Scorecard	~	ų
123 StudentNumber		**00	Ajith: Student Scorecard New	~	ĥ
		300 ——	student_library	~	ĥ
		200 —	studenttotalmarks	√5	Y
		100 —	student_library	~	Ŷ
		0	student_library	~	ĥ
		Math	ENG Chemistry	CS	

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

	Data Store	ir
ľ		ir ir
	Student_Total_marks	
	Select the related field and click on Merge to continue.	
	Relation	
6	SubjectName 📀	
		7
	CANCEL MERGE	
	ENG Chemistry CS Physic	25



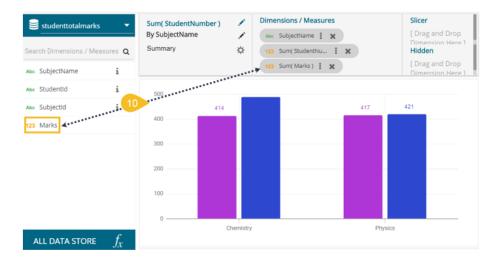
viii) A success message appears to confirm the merge of the selected Data Stores.



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

	student_library	<u>•</u>
Se	Student_Total_m	Q
Abc	SubjectName	i
Abc	SubjectId	i
Abc	Date	i
123	StudentNumber	
123	StudentNumber	

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

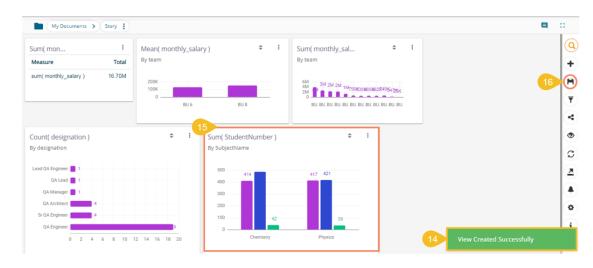


- xi) The user can add multiple Data Stores by using the same set of steps.
- xii) Drag the required measures to add the corresponding fields in the view.
- xiii) Click the '**Save**' icon.



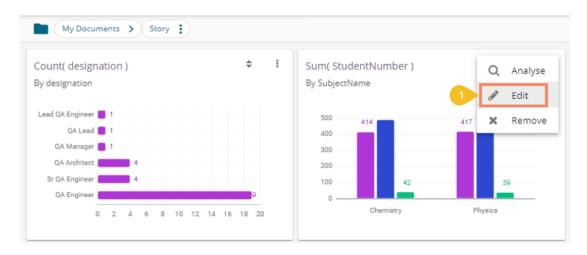


- xiv) A success message appears.
- xv) The view gets added to the storyboard.
- xvi) Click the 'Save' icon from the storyboard to save the entire story.



Note:

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



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



student_library	Sum(StudentNumber)	Dimensions / Measures Slicer
	By SubjectName 🧳	SubjectName : x III Sum(StudentNu : x [Drag and Drop Dime
arch Dimensions / Measures	Summary	Here 1 Hidden Here 1 Hidden
subjectName		[Drag and Drop Dime Here 1
s SubjectId	500	
c Date i	414	Chemistry 417 421
3 StudentNumber	400	Sum(StudentNumber) 414
		Sum(Marks) 490
	300	Count(SubjectId) 42
	200	
	100	42 39
	0	

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

6.3. Measure Summary

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

- i) Navigate to the Design tab to create a new view.
- ii) Drag and drop the required dimensions and measures.
- iii) Click the 'Configure Summary' 🌣 icon.



- iv) A window opens.
- v) Set the following details:
 - a) Show Summary: Enable or disable the summary option
 - b) Measure: Select a measure from the drop-down menu



- c) Aggregation: Select an aggregation type from the drop-down menu
- d) Format Type: Select a format type from the drop-down menu
- e) Currency Type: Select a currency symbol from the available choices
- f) Precision: Select a number to up to what the precision value can be displayed

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

Summary Proper	rties 🗙
Show Summary	•
Measure	monthly_salary 🗸
Aggregation	Sum 🔻
Format Type	Auto 🔻
Currency Type	Ø€₹£\$¥
Precision	0
	CANCEL DONE

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



6.4. Series Properties

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

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



Din	ne	nsions /	M	easu	res								
AR	c	Gender	:	×		123	Sum(Expe	:	×	123	Sum(Expe	×	

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

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

Series Prope Experience	rties:	×
Aggregation	Sum	•
Display Name		
Series Type	h. 11	
Point Shape	Hexagon	-
Line Type	Dash1	-
Axis	E	
Color	#151500	
Data Label Colo	r ff 8000	
Data Label Position	Тор	-
Filter Options	τ	
	CANCEL	APPLY

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





Note:

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

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

~
☆

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

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



C3 or	Full	Displays the full-screen view OR Reduces the display of the
tor t	Screen/Reduce	screen
	Size	

6.5. Formula Field Editor

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

6.5.1. Creating a Formula

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

🛢 ExpData		Untitled 	[Drag and Drop Dimension or Measure Here] [Drag and Drop		[Drag and Drop	Chart	Properties		
Search Dimensions / Me		Summary	¢	.1	Dimension Here 1 Hidden			_	
Abc PaymentType	i				Dimension Here 1				1
Аьс ЕхрТуре	i					:.		\sim	
Abc Desc	i								1
Abc Exp_Date	i								T
123 Amount									1
				M M		*	Í	0	
						-	-	- %	1
						-%	~/\/~	-	
		[Selec	t Dime	ension or Measure to Visualize D	ata]	1		000	1
ALL DATA STORE	(f)	[Ch	nange (chart from right hand side panel	1			-Σ	1

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

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

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



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

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

	Create Formula	×
8	Formula Range Formula Field Formula Expression [ExpType]+[Desc]	Fields ExpType Desc Amount Exp_Date

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

	ExpData	
Sea	rch Dimensions / M	leasures Q
Abc	PaymentType	i
Abc	ЕхрТуре	i
Abc	Desc	i
Abc	Exp_Date	i
123	Amount	
	Formula Field	ŵ :

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

- 1) Navigate to the 'Formula' tab.
- 2) Choose 'Summary Level' from the Level drop-down menu.
- 3) Select a 'Save as' option.



- 4) Enter a Formula Expression using the Fields and Operators.
- 5) Click the '**SAVE**' option.

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

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

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

Note:

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

6.5.2. Creating a Range

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

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



Student_Tota	l_marks	Untitled 	1	Dimensions / Measures [Drag and Drop Dimension or Measure Here	Slicer [Drag and Drop	Chart	Properties		H
Search Dimensions / M	leasures Q	Summary	¢		Dimension Here 1 Hidden [Drag and Drop Dimension Here 1			2	
Abc Studentid	i				Omension Here T		al	\bowtie	Q: ▼
Abc Subjectid	i			- 7			45		•
				~^↓		*		0	0
						=%	~/\/~	₹%	
ALL DATA STOR	$\frac{2}{f_{\rm r}}$	['		ension or Measure to Visualize D chart from right hand side panel		\$		-Σ	

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

	[Drag and Drop Dimension or Measure Here] [Drag and Drop Dimension											
n 3	Create Formula				×							
5	Name *		6 Mea	asures								
	Grade		Ma	arks	-							
8	Name	From	То									
	A	91	100		Û							
	в	75	90		ė 🛛							
	7 ADD ROW			CANCEL 9	SAVE							
			_		_							

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

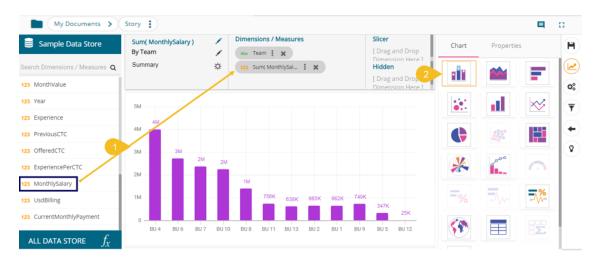
	Student_Total_marks										
Sea	rch Dimensions / 1	Measures Q									
Abc	SubjectName	i									
Abc	StudentId	i									
Abc	SubjectId	i									
123	Marks										
	Grade	ŵ :									



6.6. Order by and Limit

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

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



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

Sum(MonthlySalary) By Team	1		sions / N						and Drop	Chart 3	Properties	
Summary	☆	123 5	um(Mont	hlySal	i x			Dimen Hidder	sion Here 1 1	General Settings		(
									and Drop sion Here 1	Style:	Cluster	•
								Differ	4	Order:	None	•
5M										Exclude Global Filter	r: 🔲	(
4M										Show Data Label:	Image: A start of the start	- L
1M										Enable BaseZero:		- 1
зм —зм										Show Point:		- 1
2М	2M									Line Form:	Curve	•
2M —		1M								Show Legend:		- 1
			756K				749K			Enable Slider:		_
1M —			7 SOK	638K	665K	662K	749K	347K		View Filter		
0									25K	Filter:	None	•
BU 4 BU 6 BU 7	BU 10		BU 11	BU 13	BU 2	BU 1	BU 9	BU 5	BU 12	Category Axis		
										Title:		

- v) The user gets the following options to display the selected data in a particular order.
 - a. None
 - b. Ascending
 - c. Descending
 - d. Manual Sort



Style:	6	Cluster	- 1	
Order:	5	None		
Exclude (Global Filter	Ascending	7	
Show Da	ta Label:			
Enable B	aseZero:	Descending		
Show Poi	int:	Manual Sort		
Line Form	n:	Curve	-	

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

	Chart	Pr	operties	
	General Set	tings		
	Style:		Cluster	-
	Order:		Ascending	-
6	Order By:		sum(Month	lys 🔻
	Limit:		0	

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

Dimensions / Measures	Slicer [Drag and Drop	Chart	Properties	7
123 Sum(MonthlySal 🚦 🗙	Dimension Here 1 Hidden	General Settings		~)
	[Drag and Drop	Style:	Cluster 🔹	
	Dimension Here 1	Order:	Assending -	X\$
	0	Order By:	sum(MonthlySal	7
	4M	Limit:	Team	5
		Exclude Global Filte	r	\sim

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

Chart	Properties	
General Setti	ngs	
Style:	Cluster	•
Order:	Ascending	•
Order By:	sum(Monthly5	•
Limit:	5	+

ix) The following image displays a monthly salary for the 5 teams in the ascending order.





Note:

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

Sum(MonthlySalary)			¢	:
By Team				
800K	638K	662K	665K	
600K 400K 347K				
200K				
BU 12 BU 5	BU 13	BU 1	BU 2	

6.6.1. Sort based on Non-existing Dimension

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

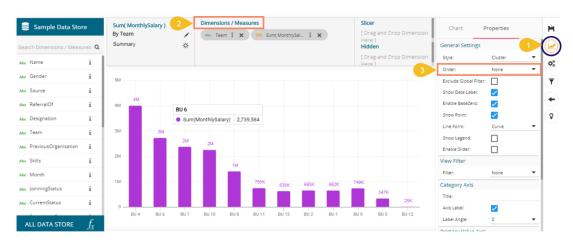




6.6.2. Manual Sort

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

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



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

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

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

6	Manual So	ort	08) î	^				×	d
G		SAVED							
8	Order Name *		9	Select Dimen	sion				1
	Manual Order 1			Team				•	ł
	BU 4								
	BU 1			10	^	۲	1	ŧ	
	BU 6					Мо	ve to Te	op	
	BU 7								
	BU 10								
	BU 8								
	DU 11			CANCEL	A		PLY	1	l



xii) The View fields get displayed in the selected Manual Sort order.



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

eam : 🗶 🗚 sum(Usobii	ling) : X	
Manual Sort		× a
NEW SAVED]	
Select Dimension	2 Select Order	
Team	 manual order 	$\overline{\mathbf{O}}$
Referral		- 11
CareerNet		- 11
Internal		- 11
BDB		- 11
Drive		
lvyPeople		g)
- RMS longlabe		к
	CANCEL SAVE 8	APPLY

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





6.7. Adding a Slicer

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

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



- iv) Order the displayed data sorting it by specific limit.
- v) The displayed view gets modified accordingly.
 E.g., The following image shows the designation-wise salary for teams BU 4 and BU 6 through Mixed Chart.



Sample Data Store	:	Sum(MonthlySalary) By Team		Abo Team : X 123 Sum(Mor	nthlySal 🚦	Slicer	esignation 🗙	Chart P	roperties	
arch Dimensions / Measure	es Q	Summary	*			Hidden		General Settings		
ReferralOf	i e					[Drag a Dimensi	nd Drop ion Here 1	Style:	Cluster	•
 Designation 	, <mark>5</mark>	-		BU 6				Order:	Descending	•
-	·	3M		Senior Software Engineer	66,667			Order By:	sum(MonthlyS	•
c Team	i			Lead Software Engineer	208.333		4	Limit:	2	
 PreviousOrganisation 	i	2M		QA Engineer	731,666			Exclude Global Filter:		
o Skills	i	214		 Associate QA Engineer 	50,000			Show Data Label:	\checkmark	
e Month	i			Lead QA Engineer	116,667			Enable BaseZero:	\checkmark	
		2M		QA Manager	150,000			Show Point:	\checkmark	
JoinningStatus	i			QA Architect	266,667			Line Form:	Curve	•
c CurrentStatus	i			Senior QA Engineer	1,149,584	1	м	Show Legend:		
ExperienceCategory	i	1M						Enable Slider:		
			713K			732K		View Filter		
© Comments	i							Filter:	None	-
c ExpectedJoinningDa	i	500K 321K						Category Axis		
be BillStartDate	i	233K				20810 26710		Title:		
3 Candidateld			146K 104K		67K	208K 117k ^{50k} 50K		Axis Label:		
MarshValue	- 1	0	BU 4			BU 6		Label Angle:	0	•

Note:

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

6.8. Shared Views

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

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

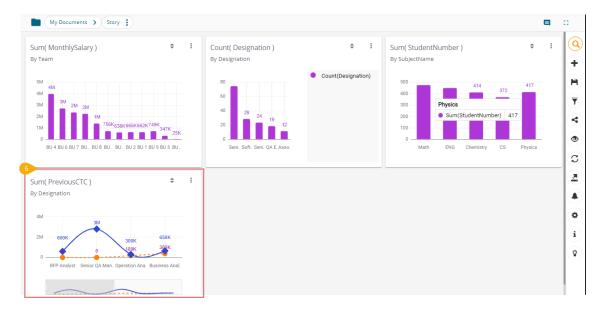
m(MonthlySalary)		ount(Designation) Designation	÷ :	Sum(StudentNumber) By SubjectName	\$	1	
M BU 1 BU 1 Sum(MonthlySalary) 661,666 1M 758K 530K 662K 662K 749K 9 BU 4 BU 6 BU 7 BU. BU 8 BU. BU. BU 2 BU 1 BU 9 BU 5	256	80 60 40 29 24 19 20 5eni. Soft. Seni. QA E. Asso.	Count(Designation)	500 400 200 100 Math ENG Chemistry CS	417 Physics		

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



Search	Q	4
Sum(MonthlySalary) By Team	Count(Designation) By Team By Gender	s)
	Preview Info	
Sum(Experience) By Gender	Sum(PreviousCTC) By Team By Designatio	
	Preview Info	
Sum(PreviousCTC) By Designation	Sum(PreviousCTC) By Designation By Designation	
	Prevlew 3	
ALL DATA STORE		

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

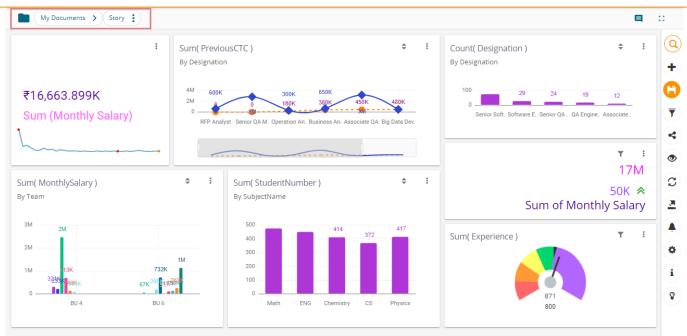


7. Storyboard

The user can add multiple Views on a single screen signified as a Storyboard. The user can add any number of Views based on various data stores on a single storyboard. The users can create a new View, apply Global Filter, and save an altered View using the storyboard. The views saved on a Storyboard unveils valuable data insights across the selected Data Stores or inside a vast volume of a data. The user can instantly modify themes, avail data drill, and export a business story to the desired format all from this single screen. The user can further instantly add a new View using the Search option provided on the vertical panel of the Storyboard.

The following image provides an overview of how a Storyboard may look with Views added to it across multiple datasources.





Describing the Storyboard icons:

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

7.1. Export

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

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



My Documents > Story		
₹16,663.899K Sum (Monthly Salary)	Sum(PreviousCTC) By Designation	
Sum(MonthlySalary) By Team 3M 2M 2M 73K 73K 1M 3295 Week 677, 2005 8U 4 8U 6		Export as C CSV XLSX POF PPT i Q

iii) The story gets downloaded in the selected export option.

My Documents > Story							8	0
₹16,663.899K Sum (Monthly Salary)	By Design. 4M6 2M 0	viousCTC) tion (M 300K 9 180K natyst Senior QA M. Operation An. Br	650K 380K 450K Jainess An. Associate C		Count(Des By Designation 100 - 0 - Serior	29 24 19	÷ i 12 Associate .	() + () V () ()
Sum(MonthlySalary) By Team 3M 2M	÷ :	Sum(StudentNumber By SubjectName	r)	¢ I	Sum(Expe	Sum of Monthly	17M 50K ≈ y Salary ▼ :	0 5 4 0
TM TAK 3335 Week, 67 BU 4 BU 4	732K K ²⁰⁰ کو کو BU 6 Story.pdf	200	Chemistry CS	Physics	ry.csv	871 800	Show al	i V ×

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

AutoSave 🚥 🗄 🍤 🤆	~ ~ 51	tory 👻 🔎	Search			Nidhi	Joshi N	-
File Home Insert Pag	e Layout Formulas	Data Review View	Help					ය Share
		E = ≫ ~ १३ Wrap Text E = t ± ± ⊞ Merge & Alignment	Center ~ \$ ~ 9	6 9 1	Conditional Format as Formatting V Table V	Delete ~ [∑ ~ A Z V Sort 8 V Filter ~ Editin	Find & Select ~
A1 * : × ✓	fx Senior Developr	nent Manager						
A	в	c	D	E	F	G	н	1.1
1 Senior Development Manager					Associate Software Engineer			
2 320833			713332		145834			
3 731666		116667		150000	BU 6	266667	1149584	208333
4 Designation	count Designation							
5 Senior Software Engineer	75							
6 Software Engineer	29							
7 Senior QA Engineer	24							
8 QA Engineer	19							
9 Associate Software Engineer	12							
10 SubjectName	sum_StudentNumber							
11 Math	478							
2 ENG	453							
3 Chemistry	414							
4 CS	372							
5 Physics	417							
16 Designation	sum_OfferedCTC	sum_PreviousCTC						
17 RFP Analyst	600000							
18 Senior QA Manager	2800000							
9 Operation Analyst	300000							
0 Business Analyst	650000							
21 Associate QA Engineer	3125000							
22 Big Data Developer 23 Software Developer	480000	480000						
23 Software Developer 24 AWS Consultant	480000							
24 AWS Consultant	650000	510000						
Story 🕀					E 🔳			



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

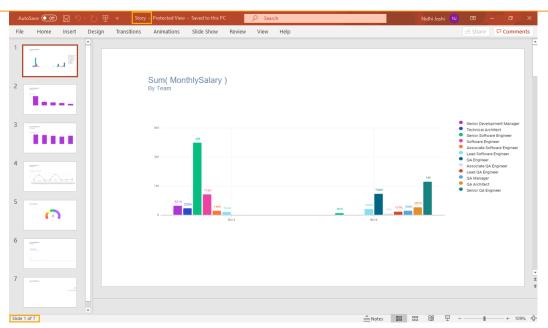
,	AutoSave 💽 🗄 🏷 🤆	~ ↓ Story	- Repaired -		𝒫 Search			
Fi	ile <mark>Home</mark> Insert Page	e Layout Formulas	Data	Review	View Help)		
ſ	Calibri	, 12 → A^ A =	= = 🗞	∽ ab Wr	ap Text	Genera	1	~
Pa								
	- ≪ B 1 <u>0</u> · <u>m</u> .	• 💁 • 📕 🏼 🚍	= = =	<u>→</u> = 😫 Me	erge & Center 👻	» ~	% 🤊 🔝	→0 Forma
Cli	ipboard 🛛 Font	۲ <u>م</u>		Alignment			Number	L7
E6	• • E × 🗸	f _x						
	А	В	с	D	E	F	G	н
1	Designation	count_Designation						
2	Senior Software Engineer	75						
3	Software Engineer	29						
4	Senior QA Engineer	24						
5	QA Engineer	19						
6	Associate Software Engineer	12						
7								
8 9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19 20								
20								
22								
23								
24								
	Sum(MonthlySala	ry) Count(Desig	nation)	Sum(Stude	ntNumber)	Sum(Pre	eviousCTC)	🕂 :
	Sun(monanjoud			a and o cade				

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

Edit View Window Help Open	1 / 7	Tools Fill & Sign Comment
Open 🤤 🛃 🌌 🍙 💾 🖨 🖂	1 / 7 74.7% 74.7% 9 9 9 9 9 1	Sign In
		▼ Export PDF
Sum(MonthiySalary) By Team 3M 2M 2M		Adobe ExportPDF Convert PDF files to Word or Excel online. Seted PDF File: Story.pdf 1 file / 53 Convert To: Microsoft Word (*.docx) Recognize Toxt in English(U.S.) Change
1M 713K	732K 67K 2000 117K 550 207K	Change Convert > Create PDF > Edit PDF

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





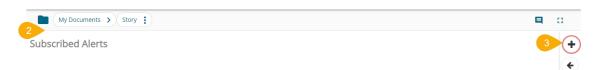
7.2. Alert Center

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

i) Click the 'Alert Center' 🐥 icon on the Storyboard.

I	Sum(Prev By Designat	,	\$ 1	Count(Designation) By Designation	\$:
₹16,663.899K Sum (Monthly Salary)	4M 2M 06 RFP A	300K 180K 380K 550F nalyst Senior QA M. Operation An. Business A	3M n. Associate QA.	100 Senifor S. SoftWare, Senifor Q. (QA ÉĤgin, Assb€iat.
ium(MonthlySalary) Iy Team	÷ :	Sum(StudentNumber) By SubjectName	÷ :	Sum of Mo	ិរក្រាំ 50K ጵ nthly Salary
4M 2M 3295 (600C BU 4 BU 6	1M	400 — 200 — 0 —	372 417 CS Physics	Sum(Experience)	T : 1

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





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

My Documents >	Story :			
ubscribed Alerts				
4	Alert			×
	Data Source			
	sample D	Q		
5	Sample Data Store			
	Sample Data Store Meta Data			
	Sample Data-Store Metadata			
	Sample Data Store		[Colort Data stava baying time dimension]	
	Sample Data Store Meta Data		[Select Data store having time dimension] [Select Dimension or Measure to watch]	

- vi) The following fields display to fill the required information when selecting a data store (data source):
 - a. Title: Give a title to the created alert
 - b. Dimension/Measures: Select a dimension or measure from the drop-down list
 - c. Aggregation: Select an aggregation type from the drop-down list
 - d. Time Field: Select a time field from the drop-down menu
 - e. Schedule Intervals: Select a time range to schedule the refresh intervals using the drop-down menu
 - f. Lower Threshold: Set value as the lower threshold (the default value for this field is 0)
 - g. Upper Threshold: Set value as the upper threshold (the default value for this field is 100)
 - h. Max Good Value: Enable/disable the 'Max Good Value' by a checkmark in the box
- vii) A Semi-Gauge chart displays the selected information on the right side of the screen with the value (E.g., in this case, the Semi-Gauge image displays a count of 35 Designations)
- viii) Click the 'Save' 🖹 icon.

Alert			T B ×
Sample Data Store			
Title	Alert1		
Dimensions / Measures	Also Designation 🗸		
Aggregation	Count 👻		
Time Field	BillStartDate 👻	35	
Schedule Intervals	Daily -	7 0	
Lower Threshold	0		
Upper Threshold	100		
Max Good Value			

Note:

1

a. The user can enable the 'Aggregation' field only after selecting a Dimension/Measure field from the drop-down menu.



- b. The order of colors changes in Semi-Gauge from 'green-yellow-red' to 'red-yellow-green' by enabling the 'Max Good Value' option.
- ix) A success message appears to assure about the alert creation.
- x) The newly created alert gets added to the Subscribed Alert page.

Subscribed Alerts	
10 Alert1	•
Data Store : Sample	
Property : Designati	
▲100 ▼0	
	Alert Saved Successfully

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

Subscribed Alerts



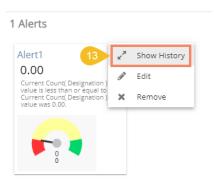
Note:

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

12	Alerts
	Alert1 0.00 Current Count(Designation) value is less than or equal to 0. Current Count(Designation) value was 0.00.
	Alert1 =
	Data Store : SampleDataSt Property : Designation
	▲100 ▼0



xiii) The user can click the '**Show History**' option for the triggered alert (The 'Show History' option displays only for the triggered alerts).



Note:

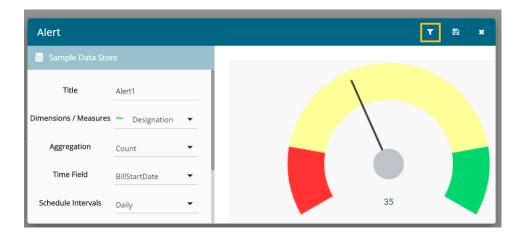
- a. Choosing the 'Edit' option redirects users to modify the inserted values for Alert.
- b. A Click on the '**Remove**' option redirects users to remove the subscribed Alert together with the triggered alert.
- xiv) A page opens, displaying the information of previously triggered alerts.

00	14 Date	Count(Designation)
	1/27/2020, 5:05:09 AM	0.00
50	1/27/2020, 5:05:09 AM	0.00
00	1/27/2020, 5:05:09 AM	0.00
50	1/27/2020, 5:05:09 AM	0.00
	1/27/2020, 5:00:07 AM	0.00
00	1/27/2020, 5:00:07 AM	0.00
50	1/26/2020, 5:05:11 AM	0.00
00	1/26/2020, 5:05:11 AM	0.00
	1/26/2020, 5:05:11 AM	0.00
50	1/26/2020, 5:05:11 AM	0.00

7.2.1. Applying Filter Condition to Alert

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

i. Click the '**Filter**' icon.





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

=	Alert			×
	Filter	⊘c ×		
	< Gender	-0		
	In	•		
	Search	۹		
	Male			
	Female			
			35	
			0	
	_		, , , , , , , , , , , , , , , , , , ,	

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

7.2.2. Deleting a Subscribed Alert

1. Click the '**Remove**' option from the Alert option menu.

Subscribed	Alerts
------------	--------

Alert1	Can b	Edit	
Data Store:	×	Remove	
Property : De	esigna	ition	
▲100	•	0	

2. A message appears to notify the user and the subscribed alert gets deleted.

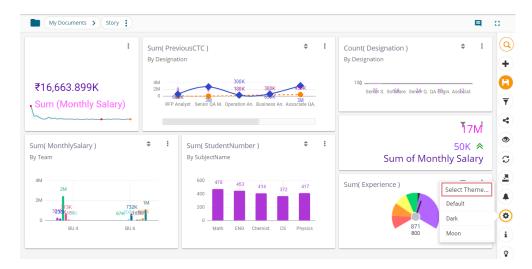
ubscribed Alerts		
		ted Successfully

7.3. Change Theme

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



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



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

My Documents > Story :				Ę	0
। ₹16,663.899K _• Sum (Monthly Salary)	Sum(Prev By Designat ^{4M} ^{2M} ⁰ ₆₀ ₆₀	001 300K 180K 380K 450K		Count(Designation) By Designation 100	 <
Sum(MonthlySalary) By Team	÷ :	Sum(StudentNumber)	:	ਿ7ਆਂ 50K ≪ Sum of Monthly Salary	0 0
4M 2M 2M 39.956 000K 0 BU 4 BU 6	1M Kirik A	600 478 453 414 372 417 400 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0		Sum(Experience) B71 B00 Select Theme Default Dark Moon	

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

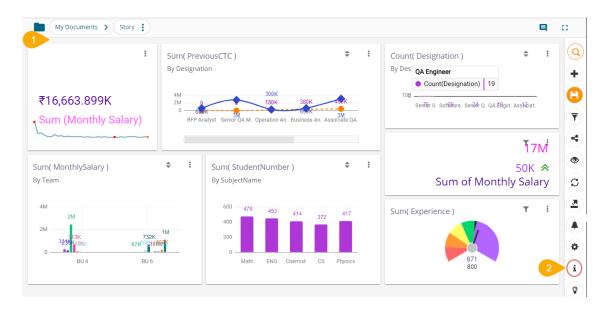




7.4. Data Store Information

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

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



- iii) The selected Data Store(s) for the current story appears with some action icons. The user can perform the following actions by using the various icons provided for a Data Store:
 - a. Primary Store 🛎 : It marks the selected Data Store as a primary Data Store
 - b. BDB Data Insights 🔍: It redirects the users to the BDB Data Insights page.
 - c. Generate Data Insights C: It starts the insights generation process.
 - d. BDB Search 🤍 : It redirects the users to the BDB Search page for the selected data store.
 - e. View Design 🗠 : It redirects the users to the Design page for the selected data store.
- iv) Click the **'Switch to Data Sources**' 📒 icon.

My Documents > Story		E 0
Explore your Data in Seconds!	student_library	Sample Data Store
Create enriching views within a few seconds using our intuitive view builder. Alter the key dimensions and measures, change look and feel of the desired views or the entire dashboard, apply filters to fetch customized insights.	\star 🐵 C Q 🗠	3 ★ @ C Q 🗠
TO OT TO OTHER AND THE OTHER A		
		6

v) A list of the available Data Stores opens for the users to select another data store.



y Documents > Story :		E
Explore your Data in Seconds!	5 Choose your data store	
eate enriching views within a few seconds using our intuitive view builder. Alter • key dimensions and measures, change look and feel of the desired views or the	Search	۹
entire dashboard. apply filters to fetch customized insights.	ExpSummary	
	ExpData	
	ExpData	
	s wttestmrv	
000000000000000000000000000000000000000	S WTGA	
TUDOTATI	Test	
41	SalesAndCollection	
	Excel Test	
	Sales&Collection	
	InventoryDetails	
	Contoso Retail Sales	

7.5. Options Assigned to a View

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

7.5.1. Analyze

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

Count(Desig 💠 🚦 By Designation	Sum(Marks) By SubjectName	\$:	Sum(Mont By Team	hlySalary)	\$:
100 50 29 24 19 12 10 7 Sen. Sof. Sen. QA. Ass. Ass. Lea.	600 400 0 65 420 65 42 Chemistry	421 40 39 Physics		\$4M \$2M \$0	S2M BU 4	51M 567K ⁵² S50K3 ⁵ X8 ⁷ K BU 6	_
۲ :	Date Drill By ExpectedJoinningDate			÷ :	Sum(Experience) By Gender	¢	
17M 200K ≉ Sum of Monthly Salary	200 0	26 2016	195 2017	-	1K 0 699 110 Male	172 88 Female	-

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

Date Drill		Q	Analyse
By ExpectedJoinningDate		Sant	Edit
200	26	_ ×	Remove
1970	2016	2017	

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



Date Drill				
By ExpectedJoinningDate				
 Count(CandidateId) 				2
200				Ţ
150				
100	1970			•
50	Count(CandidateId) 2			
	2	26		
01	1970	2016	2017	_

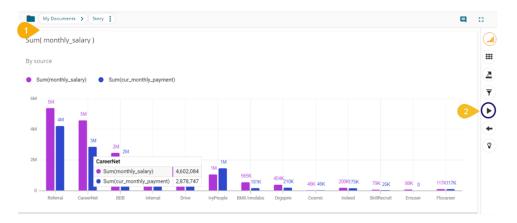
vi) The user can select any of the following options to analyze a saved view:

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

7.5.1.1. Timeline Play

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

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



- iii) The Timeline Play window opens.
- iv) Fill in the required information in the Timeline Play window:
 - a. Time Dimension
 - b. Date Interval



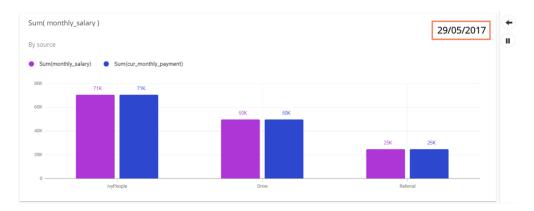
- c. Date Type
- d. Start Date
- e. End Date
- f. Time Delay
- v) Click the '**START**' option.

3	Timeline Play	×
	Time dimension	
	ExpectedJoinningDate	•
	Date Interval	
	Day	•
4	Date Type	
	Current date	•
	Start Date	
	1/1/2017	-
	End Date	
	1/30/2018	-
	Time Delay	
3	1	
		ART
DI		

- vi) The timeline play gets displayed for the selected period.
 - a. E.g., the below image displays data for the date 28th February 2017.

um(monthly_salary)		28/02/2017
source		
Sum(monthly_salary) 🔵 Sum(cu	_monthly_payment)	
300K		
	236K	
200K	175K	
100K		
0		

b. E.g., the following image displays data for the date 29th May 2017.

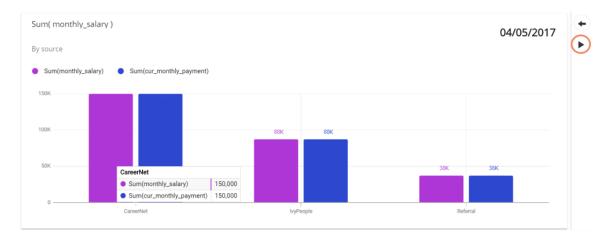


Note:

a. The timeline play can be paused by clicking the 'Stop Timeline Play' II icon.



b. The user can resume the stopped timeline play by clicking the 'Resume Timeline Play' 🕨 icon.



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

Sum(monthly_salary)			30/01/2018	-
By source				C
 Sum(monthly_salary) Sum(cur_monthly_payment) 				\sim
70K				
60K	63K			
SOK				
40K	-			
зок				
20K				
10K				
0		0		
	0	gapire		

7.5.2. Edit

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

Date Drill By ExpectedJoinningDate	Q	Analyse
by expected join in goate	AN	Edit
200 0 2 1970 2016	X 2017	Remove

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



😂 Sample Data Stor	re	Date Drill By ExpectedJoinningDate	1	Dimensions / Measures	Slicer [Drag and Drop	Chart F	Properties
Search Dimensions / Measu	ures Q	Summary	☆	123 Count(Candidat 🚦 💥	Dimension Here 1 Hidden	General Settings	
Nome	i				[Drag and Drop Dimension Here 1	Style:	Cluster 🔻
					Dimension Here I	Order:	None 🔻
6 Gender	1	200				Exclude Global Filter:	
bo Source	i					Show Data Label:	
c ReferralOf	i	150				Enable BaseZero:	
be Designation	i					Show Point:	Z
⊨ Team	i	100				Line Form:	Curve 🔻
	-					Show Legend:	
 PreviousOrganisation 	i	50				Enable Slider:	
be Skills	i			26		View Filter	
be Month	i	02				Filter:	None 👻
	0	1970		2016	2017	Category Axis	
ALL DATA STORE	f_x					Title:	

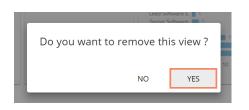
vii) The modified View gets saved successfully to the Storyboard.

7.5.3. Remove

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



- iv) A new window pops-up to confirm the removal of the view.
- v) Click the '**YES**' option.



vi) The selected View gets removed from the storyboard.

7.6. Data Interactions/Exploration

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

7.6.1. Automatic Data Drill

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

i) Navigate to the 'Hierarchy Definition' tab (while creating a data store).



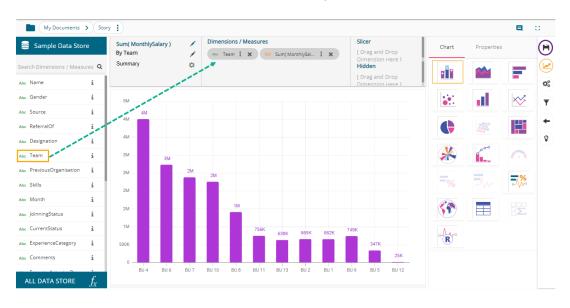
- ii) Drag and drop the dimensions one by one to the '**Drill Def**' box. Choose the dimensions among which you wish to define a hierarchical drill path.
- iii) Click the '**Next**' option.

Getting Data	Data Type Definition	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refresh
Fields		Hierarchy Definition			+
Abs Name	1	Drill Def- 1			
		Team 😑 Designation	Name -		\times
Abe Gender					
Abe Source					
Abc ReferralOf					
Abs Designation					
Abc Team					

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

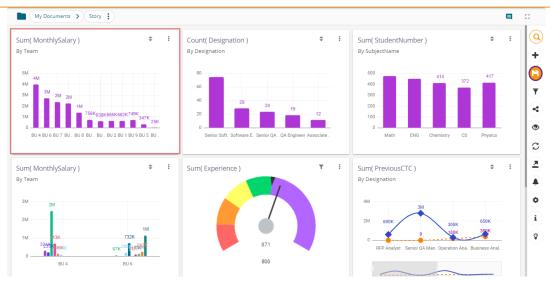
		New
Home	Data Connector Type Data Connector	
Data Connectors	All 🔹 All 👻	
Data Sets	Search Data Stores sample D	Showing 1 out of 295
🚖 Data Stores	Sample Data Store	0 C < 0 / 1
😝 Data Store Meta Data		

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

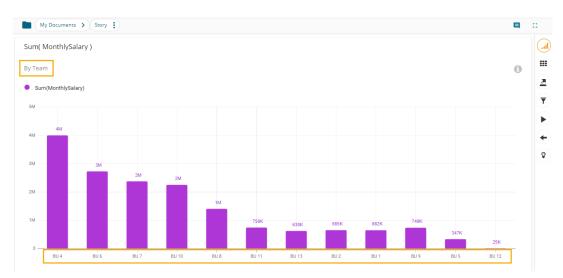


- viii) Access the saved view on the storyboard
- ix) Open the Analyse window by double clicks on it.

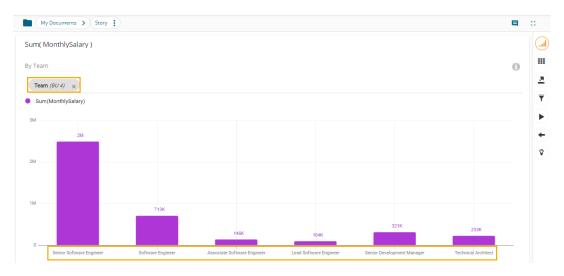




x) The **Analyse** window opens, displaying *Team* as the highest-level granularity of data drill.

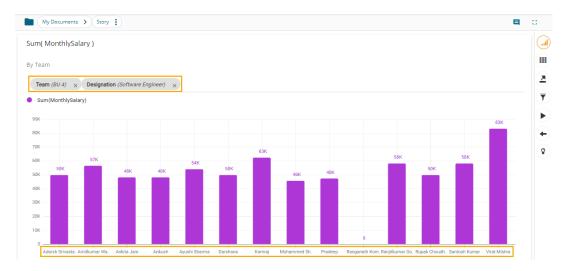


xi) Click on a team to display the designation wise break up for the selected team (E.g., The following image displays designations for the *Team BU-4*).





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



7.6.2. Automatic Date Drill

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

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

	\bigcirc	3	4	5	6
tting Data	Data Type Definition	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refre
Fields		Hierarchy Definition			+
Abe ExperienceCateg	jory	Drill Def- 1			
Abs Comments		Team — Designation —	Name —		×
Abc CandidateId		Drill Def- 2			
Abc Year	2Date 4************	year	Expected JoinningDate:	ExpectedJoinningDate:	⊖ ×
🕓 ExpectedJoinning	gDate				
BillStartDate					

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

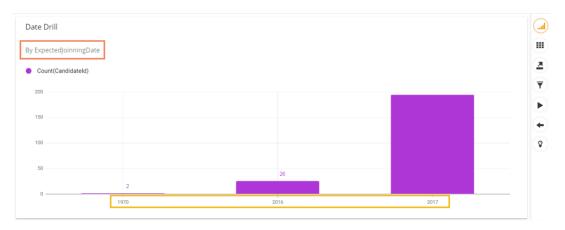
🗮 Data Center		New
Home	Data Connector Type Data Connector	
Data Connectors	All - All -	
Data Sets	Search Data Stores sample D	Showing 1 out of 29
Data Stores	Sample Data Store	0 ° < 0 / î



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

Sample Data Store	Date Drill	Dimensions	s / Measures	Slicer	Chart P	roperties	(
	By ExpectedJoinningDate	Abc Expect	tedJoinning 🚦 🗙	[Drag and Drop Dimension Here]		roperties	
earch Dimensions / Measures Q	Summary	🔅 123 Count	(Candidat 🚦 🗙	Hidden	General Settings		(
CandidateId i				[Drag and Drop Dimension Here 1	Style:	Cluster	-
• Year i				Dimension Here I	Order:	None	•
	200				Exclude Global Filter:		- 1
• ExpectedJoinningDa i					Show Data Label:	Image: A start of the start	- 1
BillStartDate i	150				Enable BaseZero:		- 1
3 PreviousCTC					Show Point:	~	- 1
3 OfferedCTC	100				Line Form:	Curve	-
					Show Legend:		- 1
3 ExperiencePerCTC	50				Enable Slider:		
3 MonthlySalary		_	26		View Filter		
3 UsdBilling	02				Filter:	None	-
	1970		2016	2017	Category Axis		

- ix) Access the saved view on the storyboard by double clicks on it.
- x) The **Analyse** window opens displaying *Year* as the highest-level granularity of date drill.

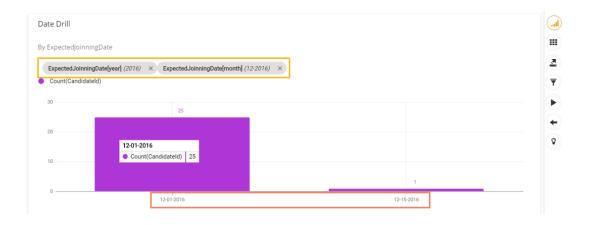


xi) By clicking the Yearly granularity of the time value, the user gets the monthly value displayed in the selected view. (E.g., the December 2016's data gets displayed in the below image)



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





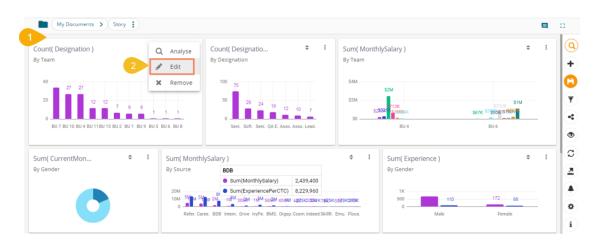
8. Actions

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

8.1. Interactions

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

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



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

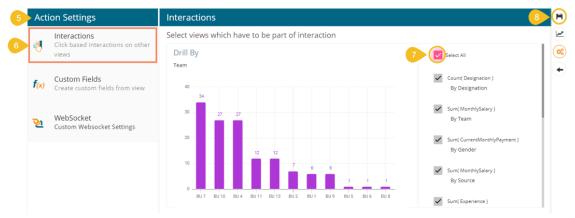


Sample Data Stor	re	Count(By Tean	Designat n	tion)	1	Abc Team	/ Measures		esignati	×	[]		op Dimension	Chart P	roperties	
rch Dimensions / Measu	ures Q	Summa	ry		☆							ere 1 i dden	- i	General Settings		
Name	i											Drag and Dr ere 1	op Dimension	Style:	Cluster	
Gender														Order:	None	· ·
	1	40												Exclude Global Filter:		
Source	i		34											Show Data Label:	 Image: A second s	
ReferralOf	i													Enable BaseZero:	~	
Designation	i	30 —		27	2	BU 4								Show Point:	~	
Team	- -					Count(Designation)	gnation) 2	7						Line Form:	Curve	•
	1	20												Show Legend:		
PreviousOrganisation	i	20												Enable Slider:		
Skills	i					12	12							View Filter		
Month	i	10			_									Filter:	None	•
JoinningStatus	i								6	6				Category Axis		
	-										1	1	1	Title:		
CurrentStatus	i	0									-	-	_	Axis Label:	~	
LL DATA STORE	f_x		BU 7	BU 10	BU 4	BU 11	BU 13	BU 2	BU 1	BU 9	BU 5	BU 6	BU 8	Label Angle:	0	-

v) The Actions tab opens.

1

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



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

E.g., By selecting BU 4 from the parent view, all the integrated views display data for the BU 4 Team.

Count(Designation) 🛛 🖸	 Count(Designatio By Designation 	Sum(Month By Team	ılySalary)	\$:
40 27 20 0 BU 7 BU 10 BU 4 BU 11 BU 12 BU 2 BU 1 BU 9 BU 5	40 32 20 14 5 80 6 80 8	\$0	5104K 5146K 5233K 5321K 57134 BU 4	\$2M	
Sum(CurrentMon 🗢 🚦	Sum(MonthlySalary) By Source	÷ :	Sum(Experience) By Gender	¢	I
	10M 5M 2M 1M 304792K 60K25K	110573K 0 0 88K78K 117280K	200	10	



8.2. Web Socket

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

- i) Navigate to the Action Settings page.
- ii) Choose the 'WebSocket' option.
- iii) Enable the WebSocket functionality.
- iv) Provide a WebSocket IP
- v) Insert a Message based on which the selected view(s) get updated (Enable View restrictions, if required)
- vi) Select the required views from the Available Views list.
- vii) Click the 'APPLY' option.
- viii) Save the configured view.

1	Acti	on Settings	WebSocket	<u>9</u>	•
	1	Interactions Click based interactions on other views	By enabling the Websocket functionality users will be able to get the latest updated data from the data source.	3	
	f (x)	4 Custom Fields Create custom fields from view	Widdockt#* ws://businessstory.com/websocket/ws 7	Available Views Count(Designation) By Designation	+
2	<u>®1</u>	WebSocket Custom Websocket Settings	New Joining Dates	Count(Subjectid) By SubjectName Sum(MonthlySalary) By Team	
		6	Enable View Restrictions.	Count (Name) By ExpectedjoinningDate	

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

Note:

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

9. Applying Filters

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

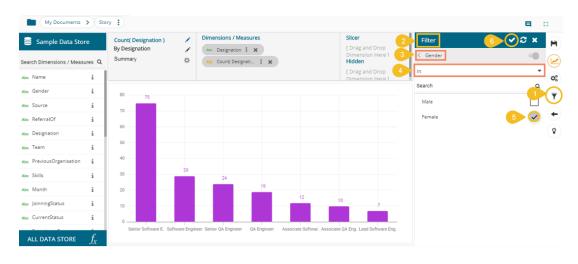
9.1. View Specific Filter

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



9.1.1. Dimension based View Filter

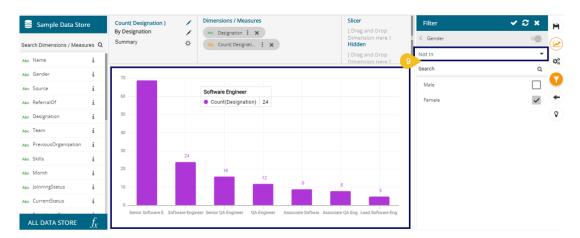
- i) Click the 'Filter' 🔻 icon from the design mode of a view.
- ii) A filter panel opens with the list of available filter values.
- iii) Select a dimension/measure/time dimension to display a list containing all the sub-dimensions.
- iv) Select the 'In' option as the filter condition from the drop-down menu.
- v) Select sub-dimension(s) by putting checkmarks in the box (the user can select multiple values).
- vi) Click the '**Apply**' **v** icon.



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



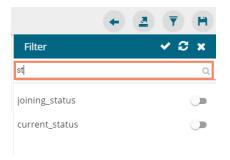
ix) If the selected filter condition is 'Not In,' then the view gets filtered by the not selected filter values.





Note:

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



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

Filter	✓ ᢒ × 📄
Contraction	
In	
Search	۹
Lead QA Engineer	V
Operation Analyst	✓ ←
QA Lead	 S
QA Manager	 Image: A start of the start of
RFP Analyst	\checkmark
Senior Architect	\checkmark
Senior Development Manager	~
Senior QA Manager	
Softw <u>are Developer</u>	
Solut maximum selection	count reached!

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

9.1.2. Measure based View Filter

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

i) Open the Filter panel on the Design New page.



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



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

Sample Data Store	Count(Designation) By Designation Count(Designation) Dimensions / Measures	Slicer [Drag and Drop Dimension Here 1
earch Dimensions / Measures Q	Summary 🌣 123 Count(Designati 🗼 🗙	Hidden General Settings
∞ Name i		[Drag and Drop Style: Cluster
Gender i		Order: Descending
_	25	Order By: count(Designa 6
source i	21	Limit: 7
c ReferralOf i	20	Exclude Global Filter:
Designation i	15	Show Data Label: 🗸
• Team i		Enable BaseZero:
_	10	Show Legend:
PreviousOrganisation	5	Enable Slider:
sc Skills 1	2	View Filter
• Month i		Filter: None 🔻

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

9.1.3. Date based View Filter

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

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





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

曼 Sample Data Store	Count(Designation) By Designation		Dimensions / Measures		Slicer [Drag and Drop	Chart Pr	roperties	
earch Dimensions / Measures Q	Summary	\$	123 Count(Designati : 🗙		Dimension Here 1 Hidden	General Settings		1
te Name i					[Drag and Drop Dimension Here 1	Style:	Cluster 🔻	1
					Dimension Here I	Order:	Descending 🔹	.
c Gender i	10	0				Order By:	count(Designa 7	
» Source i		Se	nior Software Engineer			Limit:	7	
bc ReferralOf i	8	•	Count(Designation) 9			Exclude Global Filter:		1
be Designation i						Show Data Label:	 Image: A set of the set of the	
• Team i	6					Enable BaseZero:		
						Show Legend:		1
PreviousOrganisation i	4					Enable Slider:		
be Skills i			_	3		View Filter		1
⊨ Month i	2					Filter:	None 🔻	
0	Senior	or Software Engine	eer	Software Engineer		Category Axis		1
ALL DATA STORE f_x						Title:		

ii. Relative

- i) Navigate to the Filter panel from the Design page.
- ii) Select a Date value as the filter condition.
- iii) Choose the 'Relative' option from the drop-down.
- iv) Insert a period by selecting the required values.
 - a. The user gets 'Last' and 'This' under the drop-down menu to select the past or present time zone.
 - b. There are **4 categories of time pointers** provided in another drop-down menu, which allows the user to select a value out of Years/ Months/Weeks/Days.
 - E.g., the below given image displays the 'Last 2 years' as the selected time condition.
- v) Click the '**Apply**' icon.





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



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

9.1.4. Measure Filter Via Series Properties

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

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



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

Series Prope Experience	rties: 🗙
Aggregation	Sum 🔻
Display Name	
Series Type	h. M
Point Shape	Point 🔻
Line Type	Straight 🔻
	CANCEL 5 APPLY



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

Series Prope Experience	erties:	×
6 Line Type	Straight	· ·
Color	<u></u>	- 1
Data Label Colo	or 🔛	
Data Label Position	Тор	•
7 Filter Options	٣	
	CANCEL	APPLY

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

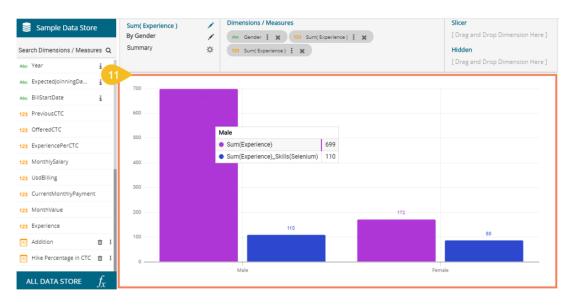
Sum(Experience Series Experi	Properties:	×
Filter		● 🕢 🕫 🗙 🚽
< Skills		-0
In		-
Search		٩
Seleniun	ı	8 2
Java		
DotNet		
		- 1
	_	_

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

um(Experience) : x Series Proper Experience	ties: 🗙
Color	<u></u>
Data Label Color	<u></u>
Data Label Position	Тор 🔻
Filter Options	۳
	CANCE 10 APPLY



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



9.2. Global Filter

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

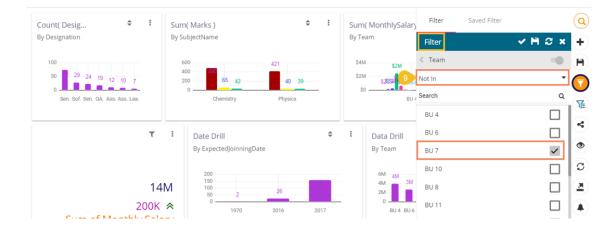
ount(Desig 🗘 🗧 🗄	Sum(Marks)	\$:	Sum(Mon	thlySalary	Filter	Saved Filter	(
y Designation	By SubjectName			By Team	2	Filter	<u>ि</u> िमि २ ४	x (
100	600	421		\$4M	3	< Team	-0	
50 29 24 19 12 10 7	400 490 200 65 42	40 39			2004	In		- (
0 Sen. Sof. Sen. QA. Ass. Ass. Lea.	0 Chemistry	Physics	-	\$0	BU 4	Search		
						BU 4		Т
τi	Date Drill			÷ I	Sum(E	BU 6		
	By ExpectedJoinningDate				5	BU 7		
17M	200			_	1K	BU 10		1
200K 🕿	0	26 2016	195 2017		0 —	BU 8		
Sum of Monthly Salary						BU 11		

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



iount(Desig 🗘 🕇 I y Designation	Sum(Marks)	I	Sum(Month By Team	hlySalary)	*	I
15 10 5 0 Seni. Soft. Asso. Lead. Dev. AWS.	600 421 200 65 42 40 39 0 Chemistry Physics		\$2M \$1M \$500K \$0	\$1M \$54K \$160K \$342K \$367K \$411K BU 7		- - -
τ :	Date Drill By ExpectedjoinningDate		¢ I	Data Drill By Team	\$:
2M 200K ≉ Sum of Monthly Salary	50	_	_	1월 BU 7		-

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



Note:

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

Filter	Saved Filter			
Filter		✓ ⊨ ≎	×	+
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Month		C		$\overline{\mathbf{T}}$
MonthlySala	ry	C		4
CurrentMon	thlyPayment	C		۲
MonthValue		C		G
monthly_sal	ary	C		
cur_monthly	_payment	C		a



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

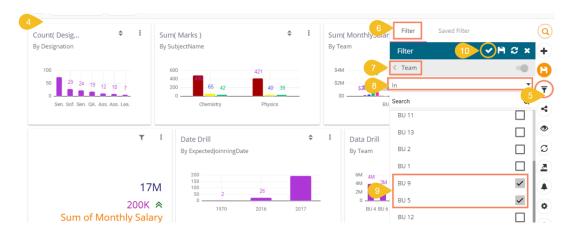
9.2.1. Exclude from the Global Filter

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

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

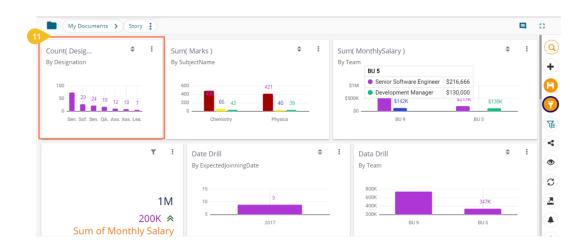


- iv) The user gets redirected to the Storyboard.
- v) Click the 'Global Filter' icon.
- vi) The 'Filter' tab opens by default to create a new Global Filter condition.
- vii) Select a data value from the available list.
- viii) Select the 'In' condition using the drop-down list.
- ix) Select the global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



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





9.2.2. Saving a Global Filter

- i) Click the 'Global Filter' icon.
- ii) The global filter panel opens.
- iii) Select the specific data values from the displayed list by using the checkmarks. E.g., In this Case, team BU 9 and BU 5 are selected.
- iv) Select the 'In' filter condition from the drop-down.
- v) Click the '**Save**' icon.

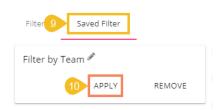
	Filter	Saved Filter	Q
2	Filter		Ħ <i>≎</i> × +
	< Team		(
4	In		
	Search		a 🧉
	BU 10		
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	BU 11		G
	BU 13		
	BU 2		
	BU 1		
	BU 9		
	BU 5		3 🔽 i
	BU 12		□ २

- vi) The 'Save Filter' window opens.
- vii) Provide a Filter Name.
- viii) Click the 'SAVE' option.

6	Save Filter	×
•	Filter Name *	
v		14 / 25
	i II (`ount(leam)	CANCEL 8 SAVE



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

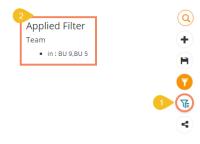


xi) The saved global filter condition gets applied to the concerned views.

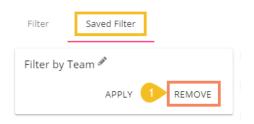
Sum of Monthly Sal	larv			·		Filter Saved Filter	
Im(MonthlySalary) Source 800K 400K 400K 425K 399K 200K Beferral Internal	¢ i 272K 255K CareeNet	Data Drill By Team 800K 700K 600K 400K 300K	547K BU 9 BU 5	¢ :	Sum(Experier By Gender		REMOVE
Im(mon I leasure Total um(monthly_salary) 16.70M	Sum(mon Measure sum(monthly_salary)	E Total	Count(Team) By Designation	÷:		•	

Note:

a. After applying a Saved Filter condition, the '**Applied Filter**' icon appears on the Storyboard menu list. The user can see all the applied Global Filter conditions by clicking the '**Applied Filter**' icon from the storyboard.



- b. Removing the Saved Filter
 - 1. Click the '**REMOVE**' option from the Saved Filters window.



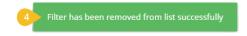
2. A confirmation window opens to remove the saved filter.



3. Click the 'YES' option.



4. A message appears to confirm that the concerned saved filter condition is removed from the list.



5. The saved filter gets removed.

9.2.3. Custom View Filter

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

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



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



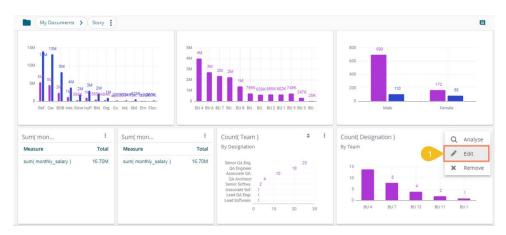


My Documents	> Story						
		752004145751527628076	5M 4M 3M 2M 0 EU 4 BU 6	2M 2M 756K 635K 665K 662K 749K 347K 25K 8U 7 8U 8 BU 8 BU 8 BU 8 BU 8 BU 8 BU 8	600 609 600 110 200 110 0 Male	172 Female	
Sum(mon	:	Sum(mon		Count(Team) 💠 🚦	Count(Designation)	÷ T	:
Measure	Total	Measure	Total	By Designation	By Team		
sum(monthly_salary)	16.70M	sum(monthly_salary)	16.70M	Senior QA Eng. 23 QA Engineer 18 Associate QA 10 QA Architect 4 Senior Software. 2 Lead QA Engl. 1 Lead Software. 1 0 10 20 30	15 10 5 8 0 8U4 8U7 8U13	2 1 BU 11 BU 1	

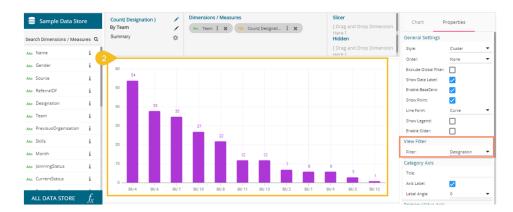
viii) The view gets customized as per the selected filter condition on the Storyboard.

9.2.3.1. Editing the Customized View

i) Click the 'Edit' option for the same view from the Storyboard.



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



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



9.2.4. Like and Not Like Operation in Filter

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

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

ietting Data	Data Type D			Hierarchy Definition		iuery			
C.	Dimensions			Meas	ures		Time	2	
Name		123	0	CandidateId	Abc	0	ExpectedJoinningDate	Abc	123
Gender		123	0	MonthValue	Abc	0	BillStartDate	Abc	123
Source		123	0	Year	Abc	O			
ReferralOf		123	0	Experience	Abc	0			
Designation		123	0	PreviousCTC	Abc	O			
Team		123	0	OfferedCTC	Abc	0			

- ii) Create a story based on the same Data Store and save it with relevant views.
- iii) Access the global filter panel and select any of the disabled Dimension values (E.g., the Source dimension is selected from the Filter panel).
- iv) Choose the 'Like' operation from the drop-down menu.
- v) Provide a Value manually to filter data. The list of sub-dimensions does not appear (E.g., BDB is the value provided for the Source dimension).
- vi) Click the '**Apply**' icon.

Count(Designation)	\$ I	Count(Skills)	\$:	Filter	Saved Filter	
By Team		By Gender			Filter	6	✓ Ħ Ə ×
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20 BU 12 • Count(Des	signation) 1	50	46		5 Value	BDB	
		o		-			
BU. BU. BU. BU. BU. BU. BU. BU. BU.		Male	Female				

vii) The concerned views get filtered as per the applied filter value.





- viii) Select the 'Not Like' as the filter operation.
- ix) The concerned views get filtered, excluding the entered values (E.g., BDB as source option displaying data for the not entered values.

Count(Designation)	\$ I	Count(Skills)	\$:		Filter	Saved Filter	
By Team		By Gender				Filter		γ≞c×
60		200 157				< Source		
40 38 31 BU 5		150			8	Not like		•
20 Count(Designa	ation) 3	50	32			Value	BDB	
0 - BU. BU. BU. BU. BU. BU. BU.		0 Male	Female					

Note: The 'Like' and 'Not Like' operations are available in the View Filter panel as well.



9.3. Comments

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

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



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100 50 29 24 19 12 10 7 0 Sen. Sof. Sen. QA. Ass. Ass. Lea.		4	00 421 00 65 42 40 39 0 Chemistry Physics	_	\$41 \$21 \$	OZ.M	51M 567K 5569kd 9707 K BU 6	-
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2	17 00K		200 150 50 2 26 0 1970 2016	2017		0	5K 538K 565K 562K 749K 347K 25K J. BU. BU.2 BU.1 BU.9 BU.5 BU	

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

			0
2	Comments		
	Description of the Story		\bigcirc
3	Description of the Story	4	

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

Com	nments	
5	Me Just now Description of the Story	Ĩ

Note:

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



10. Charts & Properties

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

10.1. Mixed Chart

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

The best situation to use Mixed Chart: To compare multiple categories **Example:** To analyze a company's budget v/s revenue.

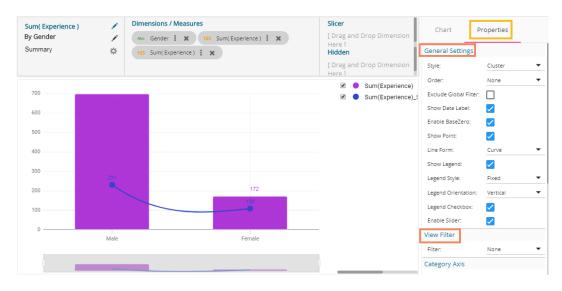
Variations of this chart-The following are the variations for this chart:

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

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



a. Filter: Select a filter condition using the drop-down menu (E.g., 'Source' is the selected filter condition in the following image).



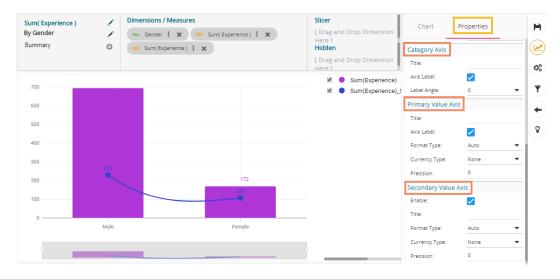
iii) Category Axis

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

v) Secondary Value Axis

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

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





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

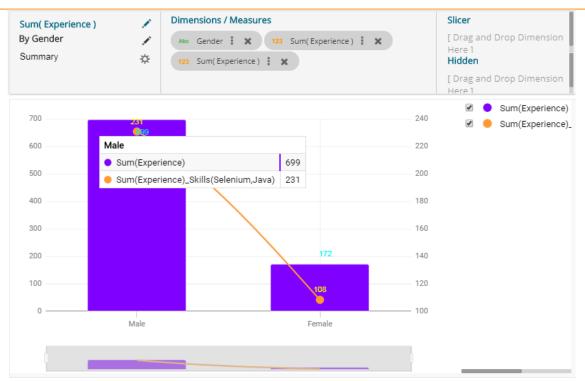
The users must configure the **Series Properties** of the dragged measure after enabling the Secondary Value Axis to display the same in the chart.

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

Series Prope Experience	rties:	×
Appregation		
Aggregation	Sum	
Display Name		
Series Type	h. A	
Point Shape	Point	-
Line Type	Straight	-
Azis	E 😑	
Color	eff\$933	
Data Label Colo	**************************************	
Data Label Position	Тар	-
Filter Options	τ	
	CANCEL	APPLY

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





10.2. Area Chart

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

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

Examples:

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

Variations of this chart: Group and Stacked Area graphs

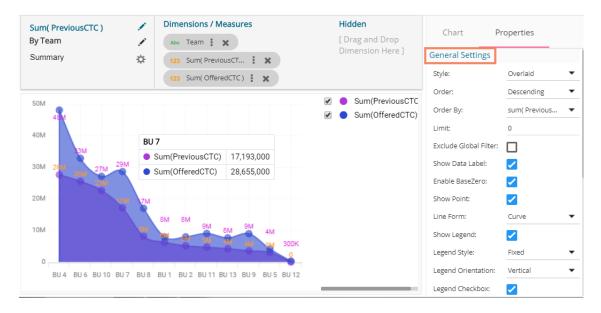
- i) General Settings
 - **a. Style**: Select a style to display the data (the provided choices for this field are: Overlaid, Stacked, 100%)
 - b. Order: Select a sequence for displaying information
 - i. None
 - ii. Ascending
 - iii. Descending
 - iv. Manual Sort (Users can manually sort the dimensions by using the indicator signs)
 By selecting an order(ascending or descending, users will be required to configure the following fields:
 - Order By- Select a value option from the drop-down menu to order the sequence of the data
 Limit- Set a number to display the requested data by this limit
 - **c.** Exclude Global Filter: The view will be excluded from the Global Filter condition by putting a checkmark in the box
 - d. Show Data Label: Data label gets displayed by using a checkmark in the given box



- e. Enable Base Zero: Base value gets presented from Zero by using a checkmark in the given box
- f. Show Point: Enable the Show Point option by using a checkmark in the given box
- **g.** Line Form: Select a line format from the drop-down menu (the provided choices for this field are: Curve and Segment)
- **h.** Show Legend: Displays legend by turning on the radio button. After enabling 'Show Legend,' users need to select the following information:
 - i. Legend Style: Select one of the following options by using the drop-down menu
 - 1. Fixed
 - 2. Floating
 - ii. Legend Orientation: This option will be provided when 'Show Legend' is enabled, and the selected 'Legend Style' is 'Fixed.' Users need to select an option out of the given choices using the dropdown menu.
 - 1. Vertical
 - 2. Horizontal
 - iii. Legend Checkbox: Enable this option by a checkmark to add the checkbox beside the Legend.

ii) View Filter

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



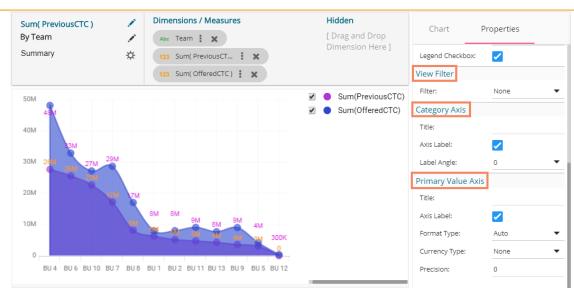
iii) Category Axis

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

iv) Primary Value Axis

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





10.3. Bar Chart

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

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

interpret data. Observations can be performed over a period.

Examples:

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

Variations of this chart:

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

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

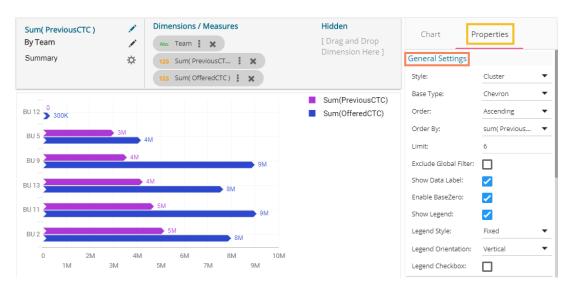
Properties:

i) General Settings

- **a. Style**: Select a style to display the data (the provided choices for this field are: Cluster, Stack, Stack Percentage, Stack Overlaid)
- **b. Base Type**: Select a base type option from the drop-down (the provided choices for this field are: Plain, Rectangle, Chevron)
- c. Order: Select a sequence for displaying information using the drop-down
 - i. None
 - ii. Ascending
 - iii. Descending
 - iv. Manual Sort (The users need to sort the dimensions by using the indicator signs manually)
 By selecting an order(ascending or descending, the user needs to configure the following fields:
 - 1. Order By- Select a value option from the drop-down menu to order the sequence of the data
 - 2. Limit- Set a number to display the requested data by this limit
- **d.** Exclude Global Filter: The view gets excluded from the Global Filter condition by putting a checkmark in the box.
- e. Show Data Label: Data label gets displayed by using a checkmark in the given box.
- f. Enable Base Zero: Base value gets presented from Zero by using a checkmark in the given box



- **g.** Show Legend: Displays legend by turning on the radio button. After enabling 'Show Legend,' users need to select the following information:
 - i. Legend Style: Select one of the following options by using the drop-down menu
 - 1. Fixed
 - 2. Floating
 - ii. Legend Orientation: This option appears when 'Show Legend' is enabled, and the selected 'Legend Style' is 'Fixed'. Users need to select an option out of the given choices using the dropdown menu.
 - 1. Vertical
 - 2. Horizontal
 - iii. Legend Checkbox: Enable this option by a checkmark to add the checkbox beside the Legend.



ii) View Filter

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

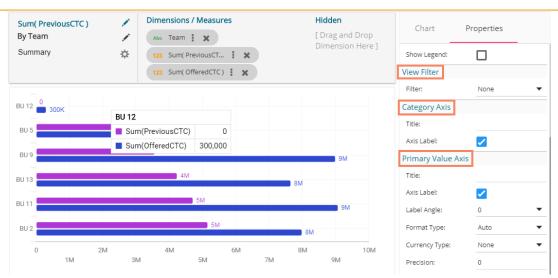
iii) Category Axis

- **a.** Title: Provide a title for the axis.
- **b.** Axis Label: Enable the category axis label by turning on the radio button.

iv) Primary Value Axis

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





10.4. Bubble Chart

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

The best situation to use a Bubble Chart:

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

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



iii. Legend Checkbox: Enable this option by a checkmark to add the checkbox beside the Legend

ii) View Filter

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

Sum(MonthlySalary) By Designation	1	Dimensions / Measures	Hidden [Drag and Drop	Chart P	roperties
Summary	☆	123 Sum(MonthlySal 🚺 🗙	Dimension Here]	General Settings	
				Base Type:	Gradient 🔻
			🕑 🔵 Sum(MonthlySalar)	Order:	Descending 🔹
				Order By:	sum(MonthlyS 🔻
6M				Limit:	7
				Exclude Global Filter:	
4M				Show Data Label:	Z
				Enable BaseZero:	~
2M 2M	1M	973K 905K		Show Legend:	
	- T	579K 497K		Legend Style:	Fixed 🔻
0				Legend Orientation:	Vertical 🗸
Senior So. S	oftware Eng	ineer QA Engineer Sr Softwa.		Legend Checkbox:	~
		ineer QA Engineer Sr Sottwa. Id Software Engi. QA Architect		View Filter	

iii) Category Axis

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

Sum(MonthlySalary) By Designation	1	Dimensions / Meas		Hidden [Drag and Drop	Chart	Properties
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0					Format Type:	Auto 🔻
Senior So. Soft	ware Eng	ineer QA Engineer	Sr Softwa.		Currency Type:	None 🔻
Senior QA Engi	neer Lea	d Software Engi. QA A	rchitect		Precision:	0



10.5. Column Stack Chart

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

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

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

Variations of this chart

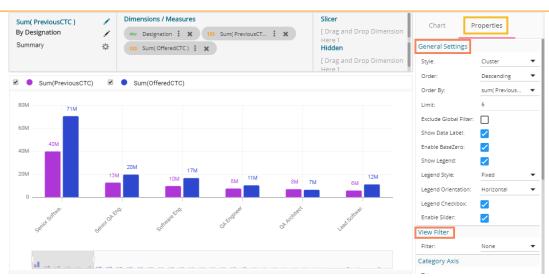
Use stacked Column charts: Where multiple categories can be clubbed together on top of each other, which makes addressing numerous questions easier.

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

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

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





iii) Category Axis

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

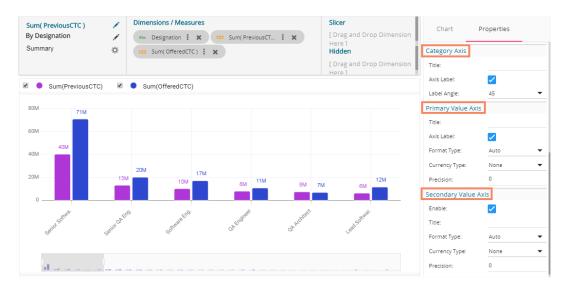
iv) Primary Value Axis

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

v) Secondary Value Axis

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

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



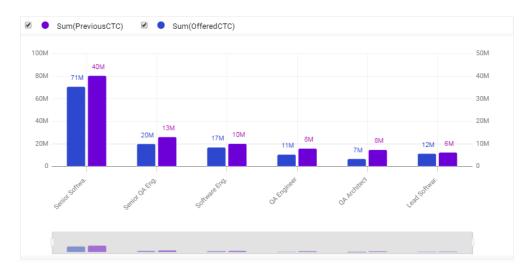


Note: When the selected Format Type is 'Percentage,' you don't get the 'Currency Type' field. The users must configure the **Series Properties** of the dragged measure after enabling the Secondary Value Axis to display the same in the chart

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



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





10.6. Line Chart

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

Best Situation to use Line Charts:

View trends in data over a period

Examples:

To indicate increasing revenue or varying stock price

Variations of this chart

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

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

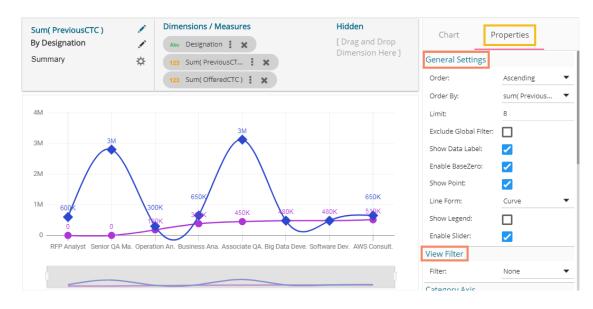
- ii) General Settings
 - **a. Style**: Select a style to display the data (the provided choices for this field are: Cluster, Stack, Stack Percentage, Stack Overlaid)
 - **b.** Order: Select a sequence for displaying information
 - i. None (default option)
 - ii. Ascending
 - iii. Descending
 - iv. Manual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



- iii. Legend Checkbox: Enable this option by a checkmark to add the checkbox beside the Legend
- i. Enable Slider: Slider gets displayed by putting a checkmark in the box

iii) View Filter

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



iv) Category Axis

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

vi) Secondary Value Axis

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

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

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



um(PreviousC	TC) 🖌	Dimensions / Measures	Hidden	Chart Properties
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ummary	¢	123 Sum(OfferedCTC) : 🗙	Here]	Category Axis
				Title:
				Axis Label:
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				Primary Value Axis
M	ЗМ	3M		Title:
	Analyst			Axis Label:
• s	um(PreviousCTC)	0	\mathbf{i}	Format Type: Auto
M 🔷 S	um(OfferedCTC)	600,000		Currency Type: None
/	/	\backslash		Precision: 0
м			650K	Secondary Value Axis
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0	o	1501		Title:
0 RFP Analys	t Senior QA Mana	. Operation Analyst Business Analyst Associate QA	Eng. Big Data Develop. Software Develop. AWS Consultant	Format Type: Auto
				Currency Type: None
				Precision: 0

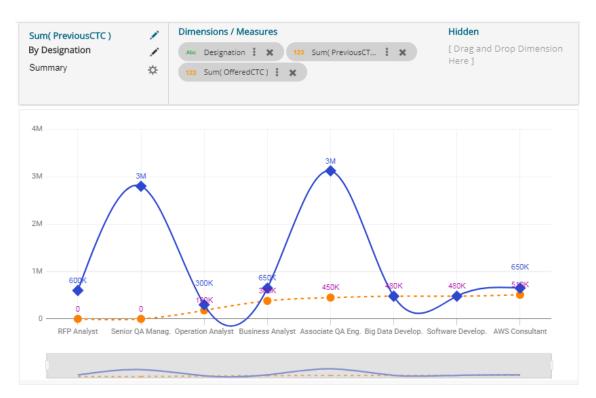
The users must configure the **Series Properties** of the dragged measure after enabling the Secondary Value Axis to display the same in the chart.

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

Series Prope PreviousCTC	erties:	×
Aggregation	Sum	-
Display Name		
Point Shape	Point	-
Line Type	Dash	-
Axis		
Color	#ff8000	
Data Label Colo	pr#a300a3	
Data Label Position	Тор	-
	CANCEL	APPLY



- e. Navigate to the 'Properties' tab.
- f. The selected changes can be seen in the displayed view.



10.7. Pie Chart

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

The best situation to use Pie Chart:

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

Variations of this chart:

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

Properties:

- i) General Settings
 - a. Style: Select a style to display data
 - i. Pie
 - ii. Doughnut
 - iii. Semi Doughnut
 - b. Order: Select a sequence for displaying data
 - i. None
 - ii. Ascending
 - iii. Descending
 - iv. Manual Sort

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

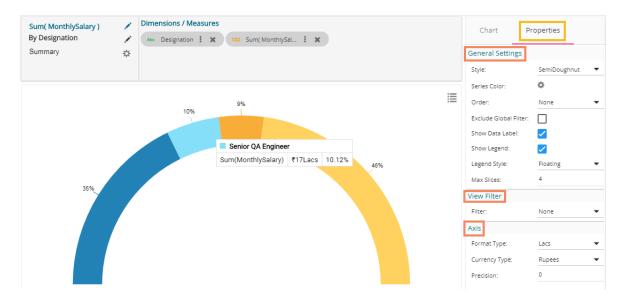
1. Order By- Select a value option from the drop-down menu to order the sequence of the data



- 2. Limit- Set a number to display the requested data by this limit
- c. Exclude from Global Filter: The view will be excluded from the Global Filter condition by putting a checkmark in the box
- d. Show Data Label: Data label will be displayed by turning on the radio button
- e. Max Slices: Set a number to limit the maximum displayed slices in the chart

ii) View Filter

- a. Filter: Select a filter condition using the drop-down menu
- iii) Axis
 - a. Format Type: Select a desired format type from the drop-down menu (the provided options for this field are: None, Auto, Percent, Thousand, Lacs, Crore, Million)
 - b. Currency Type: Select a currency symbol to be displayed in the view (the provided options for this field are: None, Euro, Rupees, Pound, USD, Yen, Cent)
 - c. Precision: Set the after-decimal value (It will show up to 5 precision)
 E.g., the below given image displays 'Sum of Monthly Salary' for Senior QA Engineer in 17Lacs as the selected currency type is 'Rupees' and the format type is 'Lacs'.



10.8. Scatter Plot Chart

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

Best Situation to use Scatter Plot Chart:

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

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

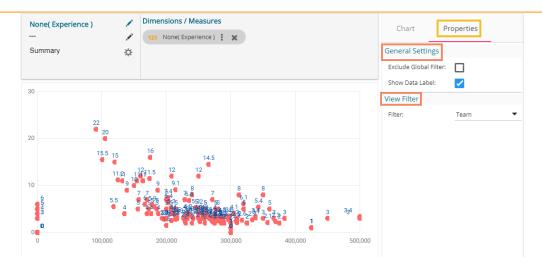
i) General Settings

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

ii) View Filter

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





Note:

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

eries Prope xperience	rties: 🗙
Aggregation	None
Display Name	
Point Shape	Hexagon 👻
Shape Color	#116666
Data Label Colo	#0052a3
Data Label Position	Тор 👻
X-Axis Field	
Measure	ExperiencePerCTC -
Aggregation	None -
	CANCEL APPLY

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

10.9. TreeMap Chart

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

Best situation to use TreeMap:

To view all the hierarchical data at one time.



Variations of this chart:

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

Properties:

i) General Settings

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

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

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

ii) View Filter

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

iii) Axis

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

E.g., The below given image displays the Sum of Monthly Salary sliced based on Team.





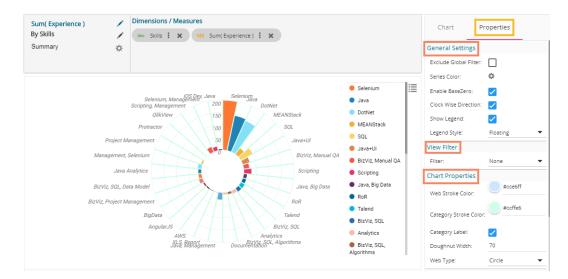
10.10. Circumplex Chart

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

Best Situations to Use a Circumplex chart:

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

- i) General Settings
 - **a.** Exclude Global Filter: The view gets excluded from the Global Filter condition by putting a checkmark in the box
 - b. Series Color: Select color for the series using the available color menu
 - c. Enable Base Zero: Base gets presented from Zero by using a checkmark in the provided box
 - **d.** Clockwise Direction: the data values get displayed in a clockwise manner by enabling a checkmark in the given box
 - e. Show Legend: Displays legend by turning on the radio button. After enabling 'Show Legend,' users need to select the following information:
 - i. Legend Style: Select one of the following options by using the drop-down menu
 - 1. Fixed
 - 2. Floating
 - ii. Legend Orientation: This option appears when 'Show Legend' is enabled, and the selected 'Legend Style' is 'Fixed.' Users need to select an option out of the given choices using the dropdown menu.
 - 1. Vertical
 - 2. Horizontal
- ii) View Filter
 - a. Filter: Select a filter condition using the drop-down menu
- iii) Chart Properties
 - a. Web Stroke Color: Select a color from the given menu
 - b. Category Stroke Color: Select a color using the given menu
 - c. Category Label: Enable the given box to display the category labels
 - d. Doughnut Width: Set (increase/decrease) width of the doughnut.
 - e. Web Type: Select an option from the drop-down menu
 - a. Polygon
 - b. Circle





iv) Primary Value Axis

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

Primary Value Axis	5	
Axis Label:		
Format Type:	Auto	•
Currency Type:	None	•
Precision:	0	

10.11. Pareto Chart

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

Best Situation to Use a Pareto Chart:

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

Variation of this Chart: Pareto Pyramid, Paired Pareto chart

- i) General Settings
 - **a.** Exclude Global Filter: The view gets excluded from the Global Filter condition by putting a **a** checkmark in the box
 - **b.** Show Data Label: Data label gets displayed by using a checkmark in the given box
 - c. Enable Base Zero: Base gets presented from Zero by using a checkmark in the provided box
 - d. Enable Slicer: the slicer gets displayed by enabling a checkmark in the given box
- ii) View Filter
 - a. Filter: Select a filter condition using the drop-down menu
- iii) Category Axis
 - a. Title: Provide a title for the axis
 - **b.** Axis Label: Enable the category axis label by using a checkmark in the box
 - c. Label Angle: Select a display angle for the axis label
- iv) Primary Value Axis
 - a. Title: Provide a title for the Primary Value Axis
 - **b.** Axis Label: Enable the Primary Value Axis label by using a checkmark in the box
 - **c. Format Type**: Select a desired format type from the drop-down menu (the provided options for this field are: None, Auto, Percent, Thousand, Lacs, Crore, Million)
 - **d. Currency Type**: Select a currency symbol to be displayed in the view (the provided options for this field are: None, Euro, Rupees, Pound, USD, Yen, Cent)
 - e. Precision: Set the after-decimal value (It displays up to 5 precision)
- v) Secondary Value Axis
 - **a.** Title: Provide a title for the Secondary Value Axis (by default it displays the cumulative average of the selected measure





Note: The look and feel of the chart can be modified from the series properties.

10.12. Semi Gauge Chart

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

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

Best Situation to use Semi-Gauge:

To monitor any performance that contains predefined ranges **Examples:**

The overall performance of a student/class in an examination. **Properties:**

i) General Settings

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

iv) Axis

a. Precision: Set the after decimal value (It can show up to 5 precision)





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



Note:

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

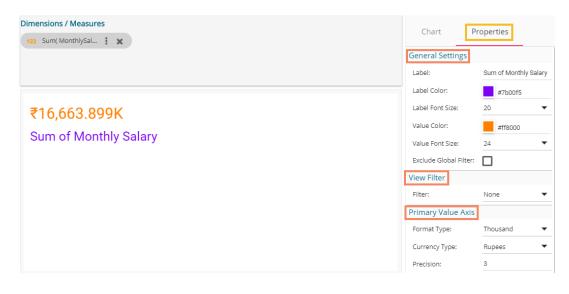
10.13. KPI Tile

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

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



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



10.14. KPI Tile: Comparative Tile

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

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

Sample Data Store	Dimensions / Measures	Chart	Properties		H
Search Dimensions / Measures Q	1				
Abc BillStartDate				3	¢ŝ
123 CandidateId			.1	\bowtie	T
123 MonthValue					
123 Year 2	1 7M 0	¢	250		+
123 Experience	о С		~~~		8
123 PreviousCTC		×	1		
123 OfferedCTC				- %	
123 ExperiencePerCTC		=%	•-/\/•°	-₩	
123 MonthlySalary					
ALL DATA STORE $f_{\!X}$					

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



	Acti	ion Settings	Custom Fields 5 NEW	H
	1	Interactions Click based interactions on other views	6 Tide	2
4	f (x)	Custom Fields Create custom fields from view	Salary	+
	2	WebSocket Custom Websocket Settings	7 Value 2000000	
			8 SAVE CANCEL	

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

Act	on Settings	Custom Fields	NEW
ĕ	Interactions Click based interactions on other views		
f (x)	Custom Fields Create custom fields from view	Salary	Œ
2	WebSocket Custom Websocket Settings		
		9 Custo	m Field Saved Successfully

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

Acti	ion Settings	Cu	ustom Fields		
Ŵ	Interactions Click based interactions on other views				
f (x)	Custom Fields Create custom fields from view	1	Salary	dî dî	۵ ۵
2	WebSocket Custom Websocket Settings				

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



c. Primary Value Properties

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

d. Secondary Value Properties

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

	Chart 12 Pro	operties	A
	General Settings		
	Label:	Sum of Monthly Salary	
	Label Color:	#f57b00	~
	Label Font Size:	20 🗸	T
	Exclude Global Filter:		
	Show Trend:	~	-
	View Filter		0
13	Filter:	Name 🔻	
	Primary Value Prope	rties	
	Font Size:	22 🗸	
	Format Type:	Auto 👻	
	Currency Type:	None 🔻	
	Precision:	0	
	Secondary Value Pro	perties	
	Secondary Value:	Salary 🔻	
	Font Size:	20 👻	
	Format Type:	Auto 👻	
	Currency Type:	None 🔻	
	Precision:	0	
	Rules:	¢	

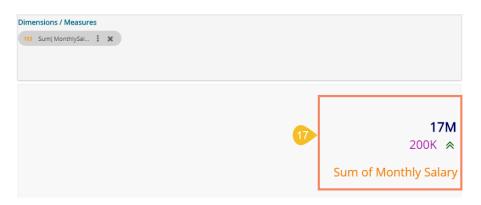
- xiv) Once the user clicks on the '**Rules**' ^(*) icon, a new screen opens, redirecting the users to set rules for displaying the comparative values.
- xv) Configure the required 'Rules' fields, as shown in the following image:
 - a. Primary Operator: Select an option from the drop-down menu.
 - b.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



- i. ADD: Selecting this option adds a new row to be configured as a rule.
- xvi) Click the '**APPLY**' option to apply the configured Rule.

14	Rules	: *						×
15	Primary Operator	Operation	Secondary Operator	Primary Value Color	Secondary Value Color	Trend Direction	Trend color	
	Primary Value 🔻	greater than or equal to 🔹	Secondary Value 🔻			Up 🔻		Ô
	ADD					CANCEL	APPLY	,

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



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

Dime	ensions / Me	asu	ires	
123	Sum(Expe	:	×	
				87
				87 3M

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



10.15. KPI Tile: Sparkline

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

Chart Properties:

i) General Settings

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

ii) View Filter

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

iii) Chart Properties

- a. Line Color: Select a line color for the Sparkline chart
- b. Fill Color: Select a fill color for the Sparkline chart

iv) Value Properties

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

Dimensions / Measures	Chart	Properties
Abc Designation : 🗙 123 Sum(MonthlySaL. : 🗶	chart	Fropercies
	General Settings	
	Label:	Sum (Monthly Salary)
	Label Color:	#9933ff
17M	Label Font Size:	20 🔻
	Exclude Global Filte	r: 🔲
Sum (Monthly Salary)	View Filter	
	Filter:	None 🔻
	Chart Properties	
	Line Color:	#006488
	Fill Color:	#86dff9
	Value Properties	
	Font Size:	22 🗸
,	Format Type:	Auto 🔻
	Currency Type:	None 🔻
	Precision:	0
	Value:	Aggregated 🔻
	Value Color:	#f500f5

10.16. Map Chart

A Map chart allows the users to position their data in a geographical context using different data layers. Users can create a view based on the selected dimensions/measures that represent data in the region.



The designated area gets colored based on the data. Users have the provisions for changing the visualization.

Best Situation to Use Map:

To represent any information in the geographical context.

Chart Properties:

i) General Settings

a. Exclude Global Filter: Use a checkmark in the box to exclude the global filter condition

ii) View Filter

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

iii) Range

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

iv) Region

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



Note:

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

Sum(UnEmployment_Rat By Country_Name	Dimensions / Measures Abc Country_N : : : : : : : : : : : : : : : : : :	Chart P	Properties
Summary	*	General Settings	
		Exclude Global Filter:	
		View Filter	
		Filter:	None 🔻
44	2 📲 - Maria Albania - Santa A	Range	
		Dynamic Range:	
· Sanda	Carl Carl Carl Carl Carl Carl Carl Carl	Color:	#00b16a
		Region	
		Select Map:	WORLD 🔻



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



10.17. Data Grid

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

Properties:

i) General Settings

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

ii) View Filter

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



By Designation Image: Skills	Sum(MonthlySalary)	🔪 Din	nensions / Measu	ires			Chart Pr	operties
Designation Team Skills Sum(MonthlySalary) Sum(UsdBilling) Senior Software Engineer BU 4 DotNet 1.30M 29.00K Font Size: Small Software Engineer BU 4 DotNet 317.50K 7.20K Italics:	By Designation	× •	Designation	X Abc Team	I X Abc Skills I X			
Designation Team Skills Sum(MonthlySalary) Sum(UsdBilling) Order By: Linit: 0 Senior Software Engineer BU 4 DotNet 1.30M 29.00K Font Size: Small Associate Software Engineer BU 4 DotNet 317.50K 7.20K Bold: C Small Lead Software Engineer BU 4 DotNet 25.00K 1.00K Italics: C Italic	Summary	* 1	3 Sum(MonthlySal		Sum(UsdBilling) 🚦 🗙		General Settings	
DesignationTeamSkillsSum(MonthlySalary)Sum(UsdBilling)Senior Software EngineerBU 4DotNet1.30M29.00KFont Size:SmallSoftware EngineerBU 4DotNet317.50K7.20KBold:ControlSmallAssociate Software EngineerBU 4DotNet25.00K1.00KItalics:ControlSmallLead Software EngineerBU 4DotNet20.80K5.50KBold:ControlSmallSenior Development ManagerBU 4DotNet320.80K5.50KBackground Color:SmallSenior Software EngineerBU 4DotNet233.30K5.00KScoude Global Filter:SmallSenior Software EngineerBU 4Java602.50K13.60KScoude Global Filter:StorSoftware EngineerBU 4Java229.20K3.60KFilter:Filter:Filter:Associate Software EngineerBU 4Java229.20K3.60KFilter:Filter:Software EngineerBU 4Java229.20K3.60KFilter:Filter:Software EngineerBU 4Java229.20K3.60KFilter:Filter:Software EngineerBU 4Java229.20K3.60KFilter:Filter:Software EngineerBU 4JavaSoftwareSoftwareSoftwareFilter:Software EngineerBU 4JavaSoftwareSoftwareSoftwareSoftware EngineerBU 4JavaSo							Order:	Ascending
Senior Software Engineer BU 4 DotNet 1.30M 29.00K Font Size: Small Associate Software Engineer BU 4 DotNet 317.50K 7.20K Bold: Italics:							Order By:	
Software Engineer BU 4 DotNet 317.50K 7.20K Bold: Italics: Ita	Designation	Τe	<u>am</u>	<u>Skills</u>	Sum(MonthlySalary)	Sum(UsdBilling)	Limit:	0
Associate Software Engineer BU 4 DotNet 25.00K 1.00K Italics:	Senior Software Engine	er B	U 4	DotNet	1.30M	29.00K	Font Size:	Small
Associate Software Engineer BU 4 DotNet 25.00K 1.00K Underline: Underline: Underline: Font Color: Image: Associate Software Engineer BU 4 DotNet 320.80K 5.50K Background Color: Image: Associate Software Engineer BU 4 DotNet 233.30K 5.00K Exclude Global Filter: Image: Associate Software Engineer BU 4 Java 602.50K 13.60K Yiew Filter Filter:	Software Engineer	В	U 4	DotNet	317.50K	7.20K	Bold:	
Lead Software Engineer BU 4 DotNet 104.20K 3.80K Font Color: I at a Background Color:	Associate Software Engin	eer B	U 4	DotNet	25.00K	1.00K		_
Senior Development Manager BU 4 DotNet 320.80K 5.50K Background Color: Image: Color: <t< td=""><td>Lead Software Enginee</td><td>r B</td><td>U 4</td><td>DotNet</td><td>104.20K</td><td>3.80K</td><td></td><td>#4c4c4c</td></t<>	Lead Software Enginee	r B	U 4	DotNet	104.20K	3.80K		# 4c4c4c
Senior Software Engineer BU 4 Java 602.50K 13.60K View Filter Software Engineer BU 4 Java 229.20K 3.60K Associate Software Engineer BU 4 Java 95.80K 4.50K	Senior Development Mana	iger B	U 4	DotNet	320.80K	5.50K		#4c4c4c
Software Engineer BU 4 Java 229.20K 3.60K Associate Software Engineer BU 4 Java 95.80K 4.50K	Technical Architect	В	U 4	DotNet	233.30K	5.00K	Exclude Global Filter:	
Software Engineer BU 4 Java 229.20K 3.60K Associate Software Engineer BU 4 Java 95.80K 4.50K	Senior Software Engine	er B	U 4	Java	602.50K	13.60K	View Filter	
	Software Engineer	В	U 4	Java	229.20K	3.60K	Filter:	Name
	Associate Software Engin	eer B	U 4	Java	95.80K	4.50K		
Senior Software Engineer BU 4 SQL 444.20K 13.20K	Senior Software Engine	er B	U 4	SQL	444.20K	13.20K		

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

10.18. Metric Summary

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

Properties:

i) General Settings

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

ii) View Filter

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

Sum(MonthlySalary)	Dimensions / Measures	Chart Properties
-	🖍 🚺 123 Sum(MonthlySal 🚦 🗶 123 Sum(UsdBilling) 🚦 🗶	Properties
	123 Sum(Experience 🕻 🗶 123 Sum(PreviousCT 🕻 🗶	General Settings
	123 Sum(OfferedCTC) 🛔 🗶 123 Sum(CurrentMo 🛔 🗶	Measure Description: Measure
		Summary Description: Total
Measure	Total	Exclude Global Filter:
sum(MonthlySalary)	16.70M	View Filter
sum(UsdBilling)	409.20K	Filter: None
sum(ExperiencePerCTC)	49.30M	
sum(PreviousCTC)	128.20M	
sum(OfferedCTC)	200.00M	
sum(CurrentMonthlyPaymen	12.30M	

10.19. R Server Visual

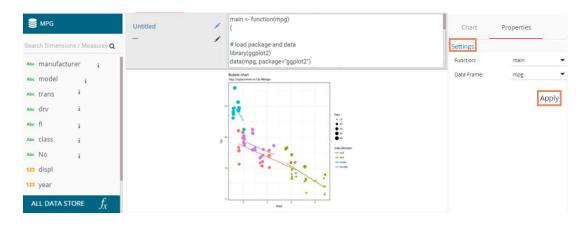
The user can see visualization based on their inserted R scripts using this charting component.

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



曼 mpg data		Untitled	R Script		0	Chart	Propertie	s
Search Dimensions / Mea	asures Q							~
Abc manufacturer	i							<u> </u>
Abc model	i					-	i.	
Abc trans	i							
Abc drv	i						1	
Abc fl	i							
Abc class	i			†1		\bigcirc	≡ %	
123 No				+-1				
123 displ						≡% ≫∿∕	*	
123 year		[Color	t Dimonsion or Mo	asure to Visualize Data	1			
123 cyl]	Σ	5	
ALL DATA STORE	f_{x}	[Ch	hange chart from rig	ght hand side panel]				

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

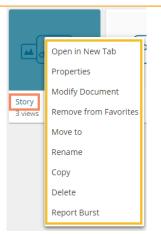


11. Operations

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

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

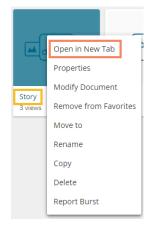




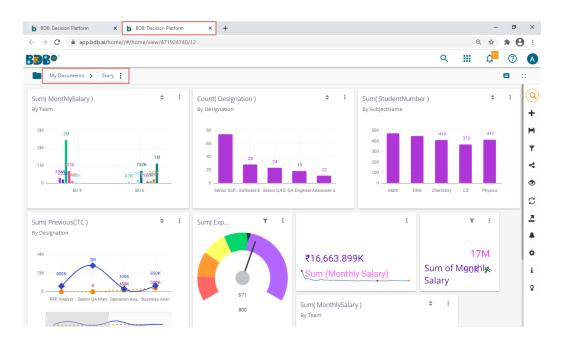
11.1. Open in New Tab

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.



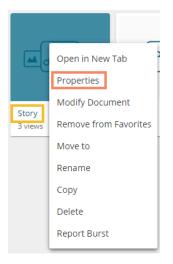
ii) The concerned story opens in a new tab.





11.2. 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.

✓ Story				
< Properties	Share with User	Share with Group	Exclude Users	
Created by:	Adminuser			
Type:	Business Story			
Version:	6.0.0			
Where:	My Documents			
Created:	Fri Mar 12 2021 14:50:4	4 GMT+05:30 (India Sta	indard Time)	
Modified:	Fri Mar 12 2021 14:50:4	4 GMT+05:30 (India Sta	andard Time)	
Description:				
Upload Image: Bro	wse			
Open document link:	https://app.bdb.ai/home	a/#/opendocument?dat	a=eyJ1c2Vyljoi	C
	Anyone with the link) Can view 🔵 Can	edit	
			Close Sa	ve

Note: The users can select via the Properties screen whether the other users to whom the story document has been shared with view-only rights or they can edit the shared copy.

- **b.** Share with User: The story document gets shared with the selected user or users.
 - 1. Select the 'Share with User' tab.
 - 2. Search for a specific user(s) using the search bar.
 - 3. Select a user or multiple users by using the tick marks in the given box(es).



- 4. Click the 'Save' option.
- 5. A success message appears, "Document privilege has been updated successfully".

Properties 5	ocument privilege has b	een updated successfully		×
Story Properties	Share with User	Share with Group		>
alluallu.Thomas			3	
anaghakn				
anil.kumar				
anushree.shinde				
ARC_gmail			4 Close	Save

- 6. The story document gets shared with the selected user or users.
- c. Share with Group: The story document gets shared with the selected user group or user groups.
 - 1. Select the 'Share with Group' tab.
 - 2. Search for the specific (user) Group(s) via the Search bar.
 - 3. Select a user group or multiple user groups using the tick marks in the given box(es).
 - 4. Click the 'Save' option.
 - 5. A success message appears, "Document privilege has been updated successfully."

Properties 5	Document privilege has been updated successfully	×
Story Properties	Share with Use 1 Share with Group	Exclude Users >
15 july 2		
AdminPermissionTes	-	3 🗹
Anuj		
Anuj_gupta		
Archanagrp		
bdb		
		Close Save

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

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



- **d.** Exclude Users: The selected user gets excluded from the privilege to access the story document.
 - 1. Select the 'Exclude Users' tab.
 - 2. Search for the specific user via the Search bar.
 - 3. Select a user or users by using checkmark(s) in the given box.
 - 4. Click the 'Save' option.
 - 5. A success message appears, "Document privilege has been updated successfully."

Properties 5	Document privilege has been updated successfully	×
Story Share with User Search	Share with Group Exclude Users	Copy to >
jubilant		3 🗹
iubilantvr		
Naveen		
Nidhi		
		4 Close Save

- 6. The selected user or users get excluded from the rights to access the concerned story document.
- e. Copy to: A copy of the story document gets created and shared with the selected users.
 - 1. Select the 'Copy to' tab.
 - 2. Search the specific user(s) via the Search bar.
 - 3. Select the user(s) by using the tick marks in the given box.
 - 4. Click the 'Save' option.
 - 5. A message appears stating, "Document copying process started. Please check the notification for confirmation."

5 Properties Confirmatio			on for	×
 Share with User 		Exclude Users	1 Copy to	>
alluallu.Thomas	٩		3	
anaghakn				
anil.kumar				
anushree.shinde				
ARC_gmail			Close	4 Save



6. The user can open the '**Notification**' window to see the updates on the current task of copying the story document. E.g., the following image displays that the Business Story 4.5 document got successfully copied to the selected users.

_		۹		Ć)
	Last 3 Notifications		Se	e All	-
	admin Copying Document Document copied with title Story	successf	ully!!!		
	admin Datastore Notification for salesfor Failed to load datastore 'salesford				
	admin Datastore Notification for Sample Loaded data to datastore 'Sample			ess	

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

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

11.2.1. Report Burst

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

- i) Navigate to the 'Public Documents' documents space.
- ii) Select a Story document and open the context menu with the available operations.
- iii) Click the '**Properties**' option.

Public Documents				Search Documents Q So	ort by: Name 👻 \Xi 🕀
					€%%
2dec19nlp ~~ 0 views	BDB Finance_feb5	BDB SAMPLES	BDB SAMPLES	BDBTEST1	Open in New Tab
	€ 6885 ►	€ 6885 1			Modify Document Add to Favorites Rename Copy
con 🗖	Copy of Business Story 0 views	nlp_hiring_2dec19 0 views	Public	Sample Public Folder	Sample Story N

- iv) A new window opens with multiple tabs.
- v) Select the 'Report Burst' tab.
- vi) Add an external or internal user(s).
- vii) Provide Subject.
- viii) Provide Description.



- ix) Schedule the selected story document by configuring the time range.
- x) Click the '**Save**' option.

Sample Story				
vith Group Example 1	xclude Users	Copy to	1 Report Burst	
Inactive				
User List				
Add internal or external users *				
	d click 'Enter' key to add extern	al email id		
Subject Report Burst	4	Description		
Schedule				
Schedule	Weekly		Monthly	
	Weekly day(s)		Monthly	
Daily			Monthly	

xi) A success message appears.

roperties	Updated successfully			>
Sample Story				
< vith Group	Exclude Users	Copy to	Report Burst	
Inactive				
User List				
Add internal or external use	rs *			
_	il id and click 'Enter' key to add exter	nal email id		
Subject Report Burst		Description		
Schedule				
Schedule				
Daily	Weekly	Monthly		
Daily		montany		
Every 1	day(s)	monting		
-	day(s)	Hendry		
Every 1	day(\$)			
Every 1	day(t)	noody	Close Save	

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



Properties				×
Sample Story	Exclude Users	Copy to	Report Burst	>
Active Stop Schedule Add internal or external users				
Administrator 🛞 Type your correct email in Subject Report Burst	s and click 'Enter' key to add extern	ial email id Description		
Schedule		Campion		
Daily	Weekly	Monthly		
Every 1	day(s)			
Every Week Day				- 1
			Close Save	

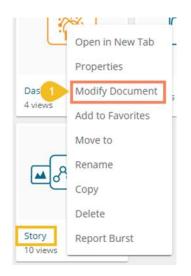
xiv) A notification message appears to inform the same.



xv) The open doc link of the selected story gets shared to the selected user at the scheduled time through the mail.

11.3. 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.

Modify Stor	, ,	<
Name * Story		
Description		//
	Close 4 Save	2

v) A confirmation message appears and the chosen information for the story gets modified.

My Documents		5 Story updated success	fully	Search Documents Q Ser	t by: Name ~ 〒 ⊕
					୶ୡୖୄୢ୶ୠ
Shared Documents	Dashboards 🖸	Data Sheets 🗖	Folders 🗈	Stories 🗖	Story ~~ 0 views

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

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

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

2	6 7. I	IC
0	Open in New Tab	-
	Properties	
	Modify Document	5
4 views	Add to Favorites	
	Move to	
A	Rename	
E 0	Сору	
	Delete	
Story 10 views	Report Burst	

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



iii) Open the 'Favorites' document using the 'My Documents' drop-down menu.



P	My Documents >		
	My Documents		
Γ	Public Docum	Public Documents	
L	Shared Docu	ments	
L	🛃 Favorites		

iv) The selected Data Sheet document gets added to the 'Favorites' space.

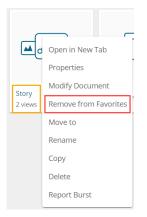
Favorites >	
€	
Story 2 views	Documents

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

Favor	ites 🗲
▲ &	Open in New Tab
Story 2 views	Remove from Favorites

OR

Navigate to the original Story document and use right-click on it to get the '**Remove from Favorites**' option.



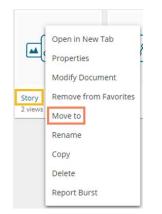
- vi) A confirmation message appears.
- vii) The selected story document gets removed from 'Favorites.'



BBB®	r Document removed from favorites
Favorites >	Botaliteit removed in on havonites
Documents	

11.5. Move to

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



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

Move to		×
My Documents		
Search		
Documents		>
	Close	Save

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

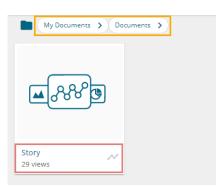


Move to	×
← Documents	
Search	
Sample Folder	>
Sample Folder	>
New Folder	>
Folder 5.0	>
	Close Save

vii) A success message appears.

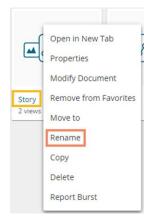
My Documents		Document moved successfully
Shared Documents	Documents	

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



11.6. Renaming a Story Document

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





- ii) Configure the following information to rename the story.
 - a. Provide a **New Name** for the story document or modify the name.
 - b. Click the 'Save' option.

Rename	×
1 New Name * Story Document	
	Close Save

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

My Documents	Document renamed successfully	
	E B S S S S S S S S S S S S S S S S S S	
Shared Documents	Documents 4 Story Document	

11.7. 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.

Open in New Tab
Properties
Modify Document
Remove from Favorites
Move to
Rename
Сору
Delete
Report Burst

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



	Open in New Tab		
	Properties	1	
	Add to Favorites	-	
	Create New Folder		
olders	Create New Story		
	Link a URL	-	
	Move to		
	Сору		
	Paste		
	Rename		
	Delete		

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

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

My Documents >
Create New Folder
Link a URL
Paste
Create New Story

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



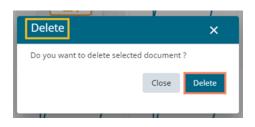
vi) The copied story document gets pasted successfully with a different name in the given space.
 E.g., The following image shows that *Story* is named *Copy of Story* and has been pasted to the 'My Documents' space.

My Documents >		
Shared Documents	Copy of Story	Dashboards

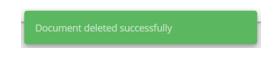


11.8. Deleting a Business Story

- 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.

11.9. Report Burst

The Report Burst operation allows the user to share the open document link of a Business Story to another user(s).

i) Select the '**Report Burst**' option from the Story options menu.

-	Open in New Tab
– ,	Properties
	Modify Document
Story	Remove from Favorites
2 views	Move to
	Rename
	Сору
	Delete
	Report Burst

- ii) The Report Burst window opens.
- iii) Add the users or user groups.
- iv) Provide a subject.
- v) Provide description (optional).
- vi) Schedule the report.
- vii) Click the 'Save' option.



2 Report Burst			×
4 Report Burst	William Martin (3)	cription	
6 Schedule Daily () Every 1 () Every Week Day	Weekly dey(s)	Monthly	_
Start time 15	▼ : <u>54</u> ▼	CI	ose 7 Save

viii) The open document link and PDF report get shared with the selected user(s)/ user group(s).

Report	¢
· projectadmin@bdb.ai	Today at 3:58 PM
To: • prakash.joshi@bdbizviz.com Report Burst.pdf 41.6 KB C Download All © Preview All	
Hello Prakash,	
Click on the below link to open report	
Reach out to us at support@bdbizviz.com for your queries and suggestions.	
Thank you, Team BDB	

Note: 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.



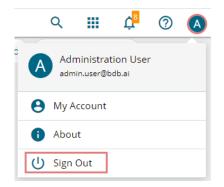


12. Signing Out

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

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

BB [©]			Q III 🗘 💿
My Documents			Administration User
Welcome to BDB Decision platform	Dashboard Designer	Business Story	My Account About
BDB is a complete decision platform for all your business needs. Drive from data to dynamic visuals and derive an actionable insight into your business data.	Design, save and publish a splendid governed dashboards. Display relevant KPIs through comprehensive and stunning visual reports to attain your business objectives.	Go beyond the classic Bl with our ground-breaking self-service Bl tool. Gain pertinent insights into your business by creating wide-ranging views on your own without external IT help.	Sign Out Itearning plan your next business move. Access and apply accurate and customizable Predictive model to maximize future opportunities.
Avail 360° view of your business by assembling, processing, and analyzing the acquired data, Access		00	
incomparable analytics at	Data Center	ETL	Data Preparation
any time from anywhere on any device.	Supports a wide range of Data sources starting from the spreadsheets in your system to a cloud-based database. Establish connections to these data sources	A self-driven Data Wrangling tool to extract data from diverse sources, including the merged data. Enforce data quality and consistency standards to deliver the output in a	Experience a secure yet self-driven mode of data preparation. Streamline the entire process of dealing with retrievable business data empowering the business
Version: 6.0.0	and build Data Sets or Data Stores to enable rich business intelligence	presentation-ready format.	users to decide with unprecedented adility.

12.1. Forgot Password Option

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

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

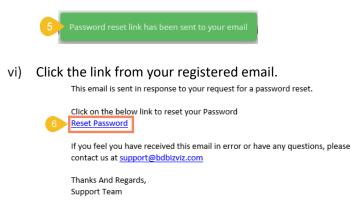


Decision Platform		
Email / User Id *		
• Password *		
Auth Type Enterprise	•	
Sign In	Forgot Password ?	
Copyright © 2015-2021 BDB	(BizViz Technologies Pvt Ltd)	

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

Forgot Passwor	d?
Please enter the registe reset your password.	red email addres
Email * admin.user@bdb.ai	
_	S
Continue	

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



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.

	Reset Password
	You have confirmed ownership of the BDB account Please reset your password to get access.
B	New Password *
	Confirm New Password *

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.

12.2. Force Login

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

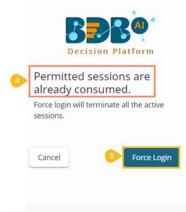
- i) Navigate to the BDB Platform Login page.
- ii) Enter the valid credentials to log in.
- iii) Click the 'Sign In' option.



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.



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- 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.