Administration Guide

Platform R-3.0

Contents

1. About this Guide

1.1. Document History

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

Product Version	Date (Release date)	Description
Big Data BizViz Platform 1.0	June 9th, 2015	First Release of the document
Big Data BizViz Platform 2.0	February 18th, 2016	Updated document
Big Data BizViz Platform 2.1	May 11th, 2016	Updated document
Big Data BizViz Platform 2.5	November 9th, 2016	Updated document
Big Data BizViz Platform 2.5.1	January 3rd, 2017	Updated document
Big Data BizViz Platform 2.5.3	March 16th, 2017	Updated document
Big Data BizViz Platform 3.0	August 31st, 2017	Updated document
Big Data BizViz Platform 3.0	October 31st, 2017	Modified document

1.2. Overview

This guide covers:

- Introduction and steps to use the Big Data BizViz Platform
- Configuration details for the Big Data BizViz Platform and its Plugins
- Administrative Tasks and Features

1.3. Target Audience

This guide is aimed at system administrators who manage the Big Data BizViz Business Intelligence Platform.

2. Introduction

2.1. Introducing the Big Data BizViz Platform

Big Data BizViz is a unique BI platform that was built to give users better knowledge and insight into their business. The BDB Decision Platform has multiple Big Data connectors that makes it both exclusive and interesting tool. It allows its users to create web services based on a verity of database connections. The created web service can then be utilized by the integrated dashboard designer. Users are enabled to provide descriptive, diagnostic, predictive, and prescriptive analytics in the cloud, on mobile devices, and on-premise.

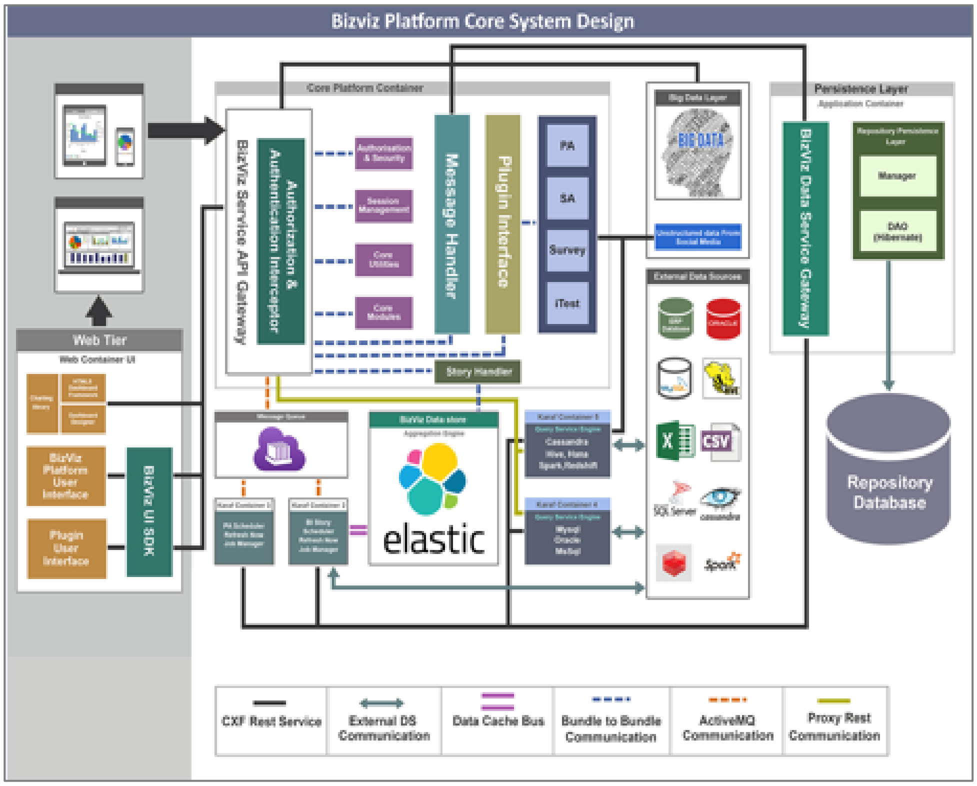
Customers having multiple branches can easily manage data by creating a single space for each branch within this platform. They can also view the information collected from multiple branches via dashboards and BI Stories. They can use ETL and Predictive Analysis to prepare and organize their existing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

2.2. Prerequisites and Supported Devices

- Browser that supports HTML5
- Operating System: Windows 7
- Basic understanding of the BizViz Server

3. Architectural Overview

The Big Data BizViz Platform has a highly scalable, n-tier client-server architecture that serves users via mobile devices, web browsers, and desktop client software.

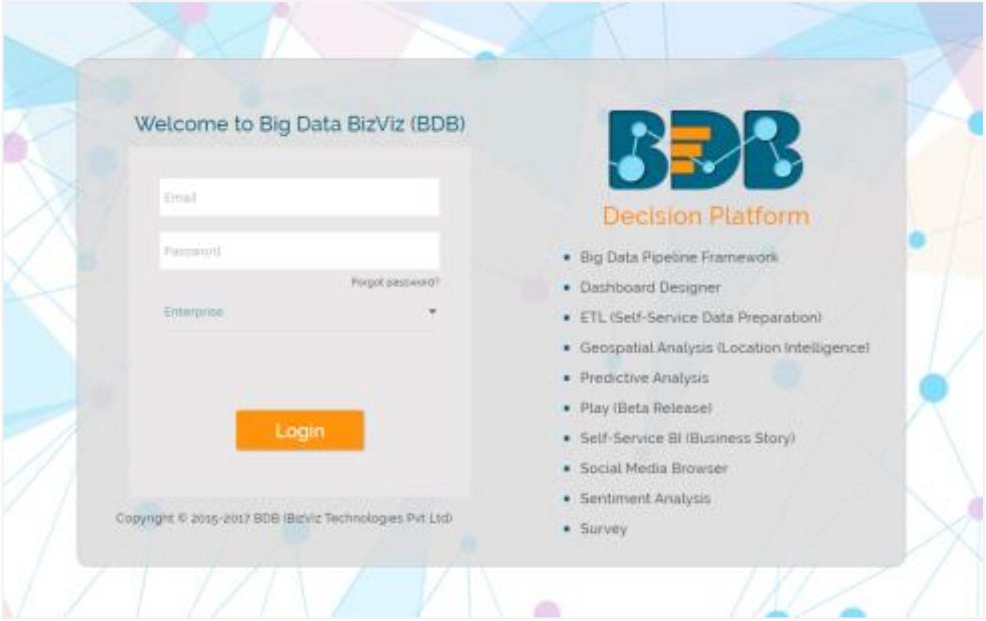


4. Getting Started with the BDB Platform

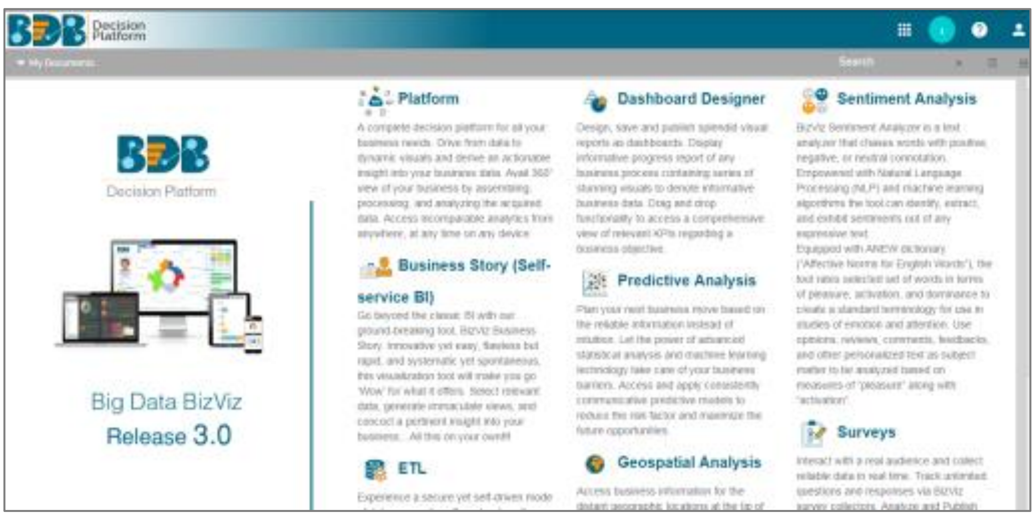
4.1. Accessing the BDB Platform

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

i) Open BDB Enterprise Platform Link: http://apps.bdbizviz.com/app/
ii) Enter your credentials to log in.
iii) Click **'Login'**



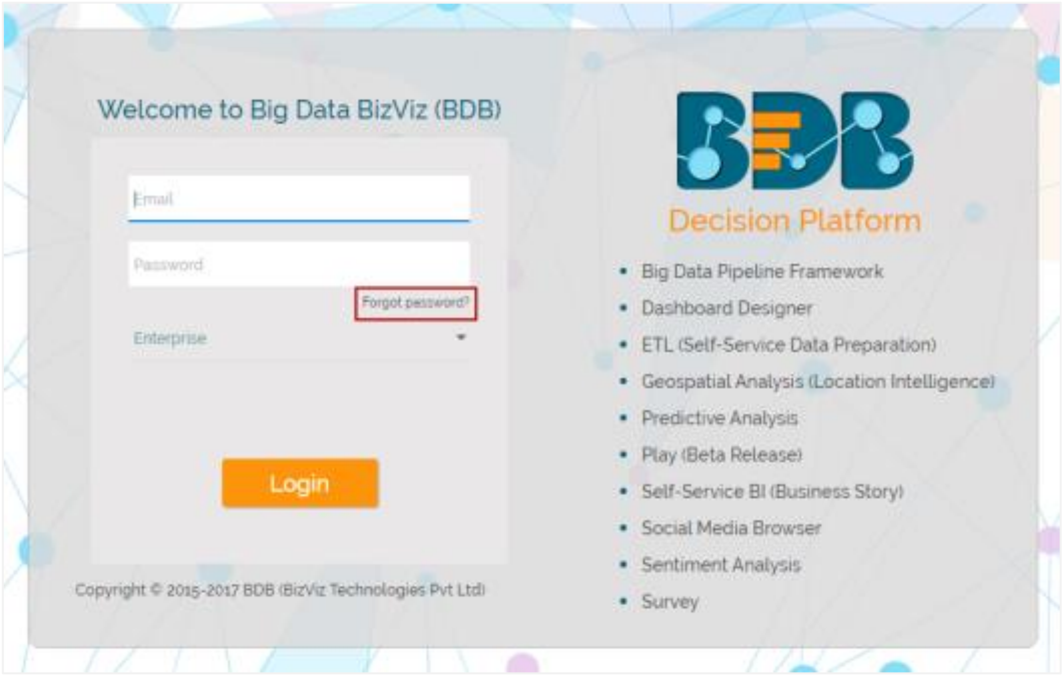
iv) Users will be redirected to the BDB Platform home page.



4.1.1. Forgot Password Option

Users are provided with an option to change the password.

i) Navigate to the Login page.
ii) Click '**Forgot Your Password?**' option.



iii) Users will be redirected to a new window.
iv) Provide the email id that is registered with BDB to send the reset password link.
v) Click '**Continue**'.

vi) Users will be directed to select a space and continue.

vii) A reset password link will be sent through email.

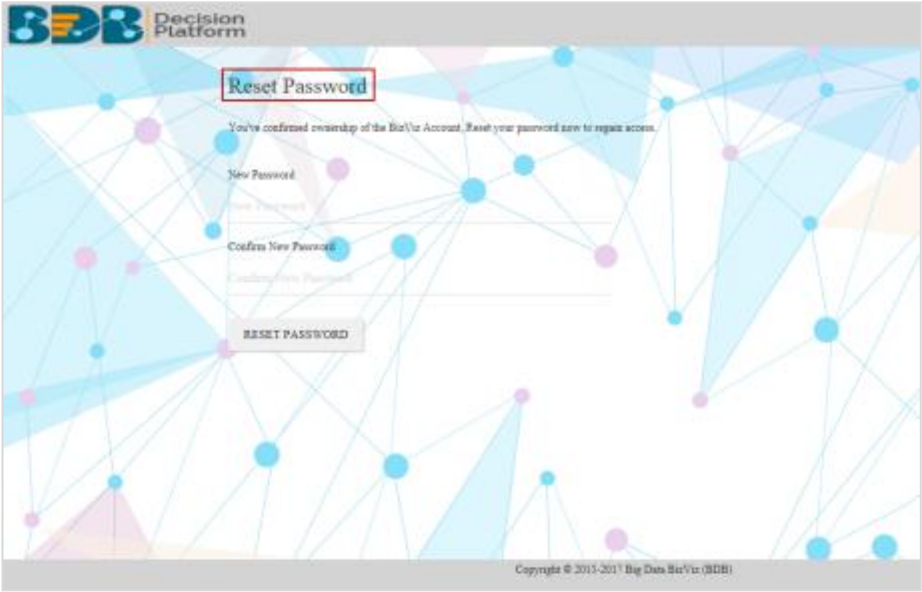
viii) Click on the link.

ix) Users will be redirected to the '**Reset Password**' page to set a new password.

a. Set a new password.

b. Confirm the newly set password.

c. Click '**RESET PASSWORD**'.



x) A message will pop-up to confirm that the password has been reset successfully.

4.2. Platform Home Page

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

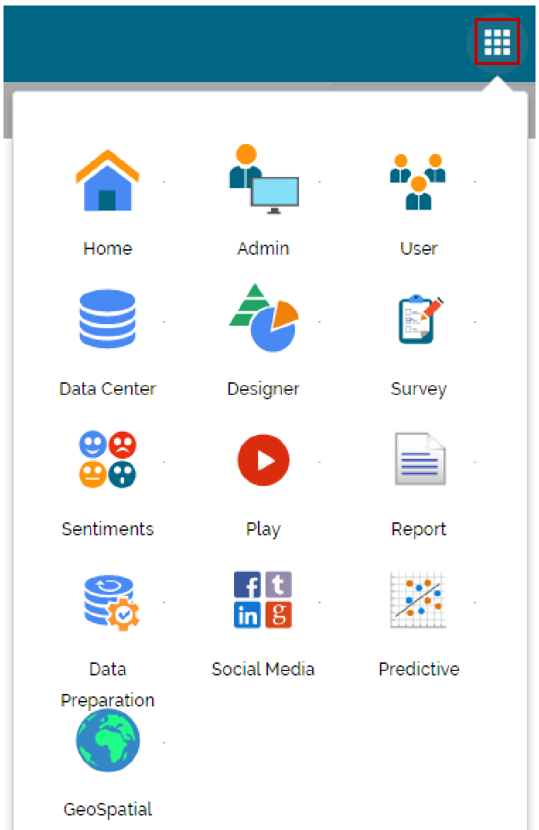
4.2.1. Apps Menu

The Apps Menu button displays all the available applications.

i) Navigate to the Platform home page.

ii) Click the ‘**Apps**’ icon.

iii) All the available plugin applications will be displayed.



Note: Users can select and open various applications by using the specific App icon provided under the ‘**Apps**’ menu window.

4.2.2. Notification Option

The Notification feature is a way to send and receive messages between people and from processes to people.

By default, two folders are provided:

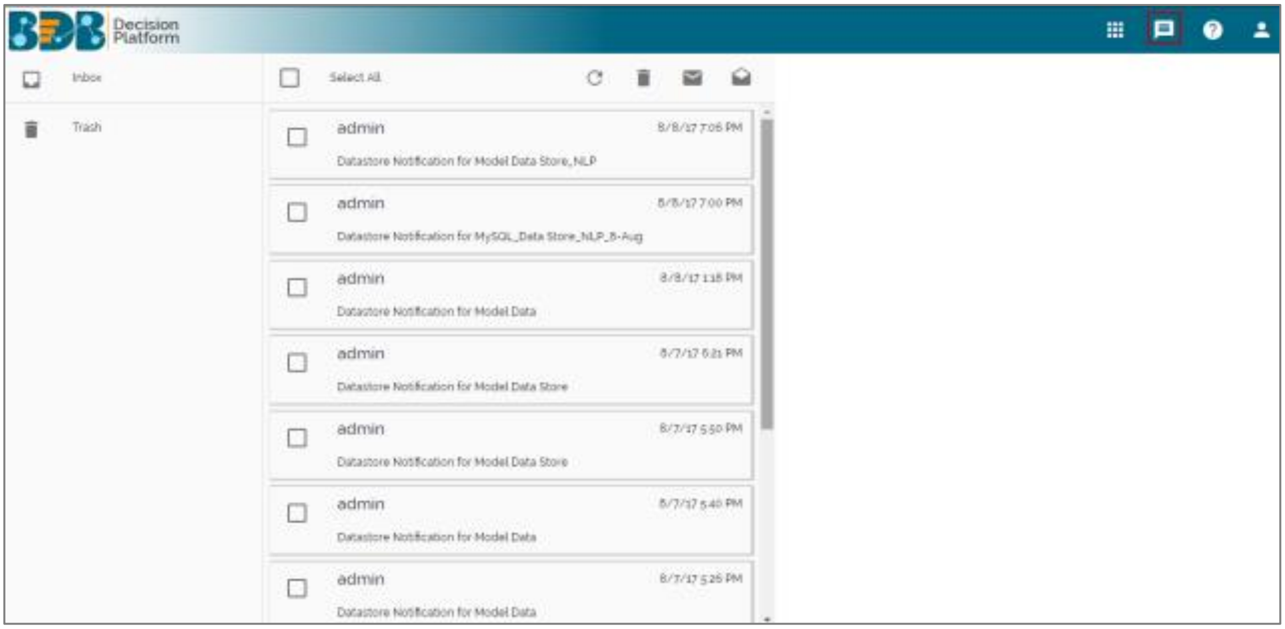
1. Inbox
2. Trash

Unread Notifications are indicated using numbers on the Platform home page.

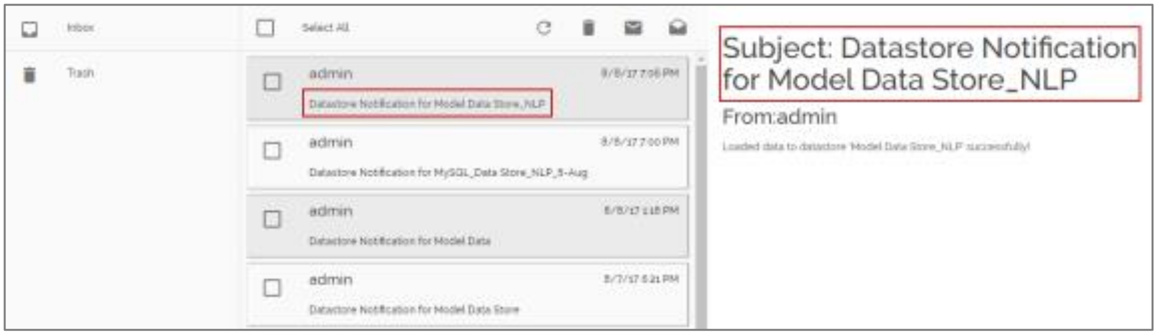
i) Navigate to the Platform home page.

ii) Click the ‘**Notification**’ option

iii) Users will be redirected to the notification ‘**Inbox**’ page (by default).



iv) Double click on a notification message will direct users to the ‘**Inbox**’ folder displaying details of the selected notification message.

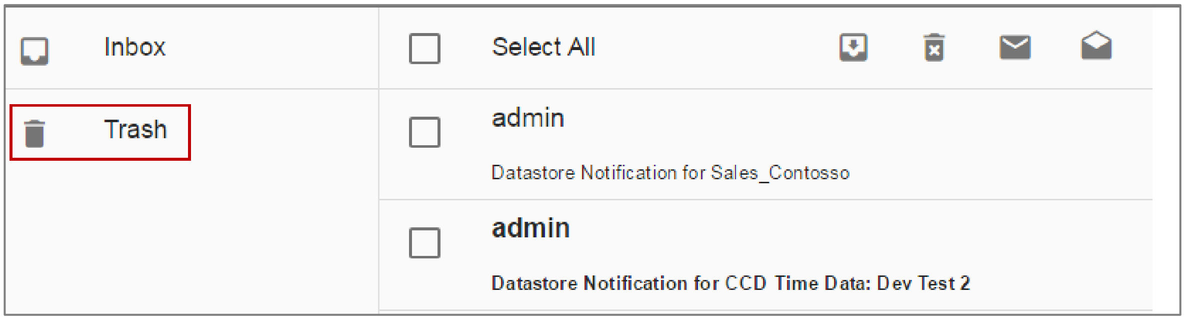


Icons provided on the inbox window:

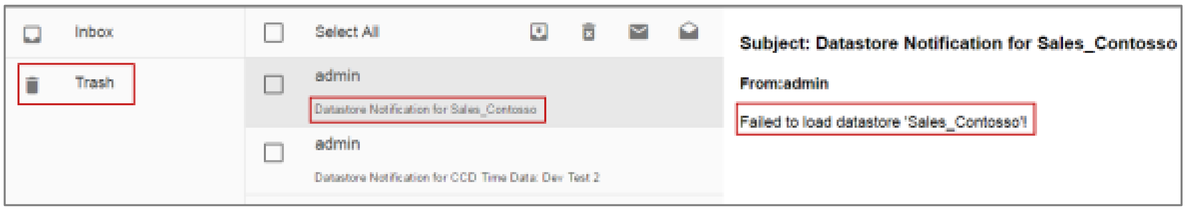
Icons	Name	Task Assigned
	Trash	Displays a list of all the deleted messages.
	Refresh	Receives the latest messages.
	Trash Message	Moves the selected messages into the Trash folder.
	Unread	Marks messages status as ‘**unread**’.

	Read	Marks messages status as ‘**read**’.

v) Click the ‘**Trash**’ icon to open the list of messages from the ‘**Trash**’ folder.



vi) Click on a message from the ‘**Trash**’ folder will open the message details.



Icons provided on the Trash-box window:

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

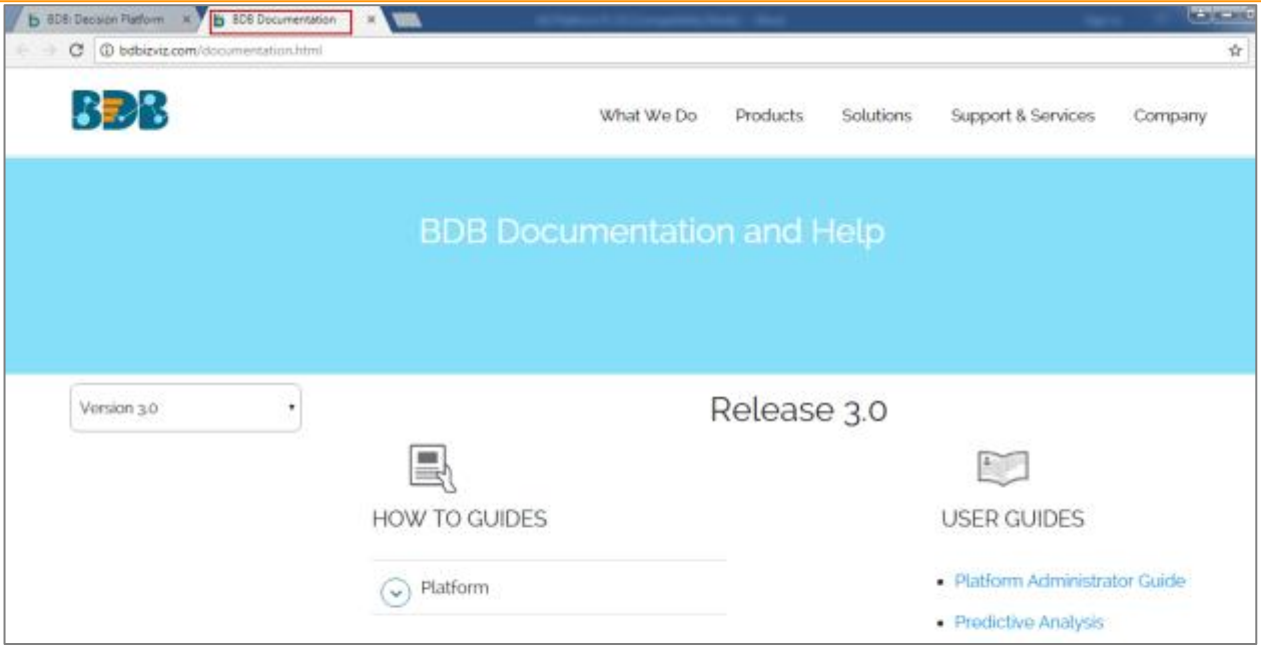
Note: An alert message will be displayed while performing the following actions:

a. Moving messages from inbox to trash.
b. Recovering them from trash to inbox.
c. Marking messages status as ‘**read**’.
d. Marking messages status as ‘**unread**’.

4.2.3. Help Menu

Users can access the help documents via this menu.

i) Navigate to the Platform home page.
ii) Click the ‘**Help Menu**’
iii) Users will be redirected to the ‘Documentation and Help’ page of the BDB website.



4.2.4. User Menu

Users will be directed to edit basic information, set preferences, change password, set API token access, and mobile device by using the '**User Menu**' option provided on the Platform home page.

i) Navigate to the Platform home page.

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

iii) Two options will be displayed:

   a. **My Account**: Displays account details of the logged in user.

   b. **Sign Out**: Helps to sign out from the Platform.

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

4.2.5. Available Documents

The Home page displays the following documents:

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

- **My Documents**
  - '**My Documents**' lists all the documents created by the user or assigned to the user.

- The documents are displayed as thumbnails.

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

- **Shared Documents**
  - The documents shared by users will be part of the ‘**Shared Documents**’.
  - Users can not edit or delete the shared documents.

- **Favorites**
  - The documents marked as favorite by a user are saved under ‘**Favorites**’.
  - Generally, the documents in frequent use by the users are a part of Favorites.
  - Users can remove a document from ‘**Favorites**’ (if desired).

Note: ‘**My Documents**’ will open by default while opening the BizViz Platform home page.

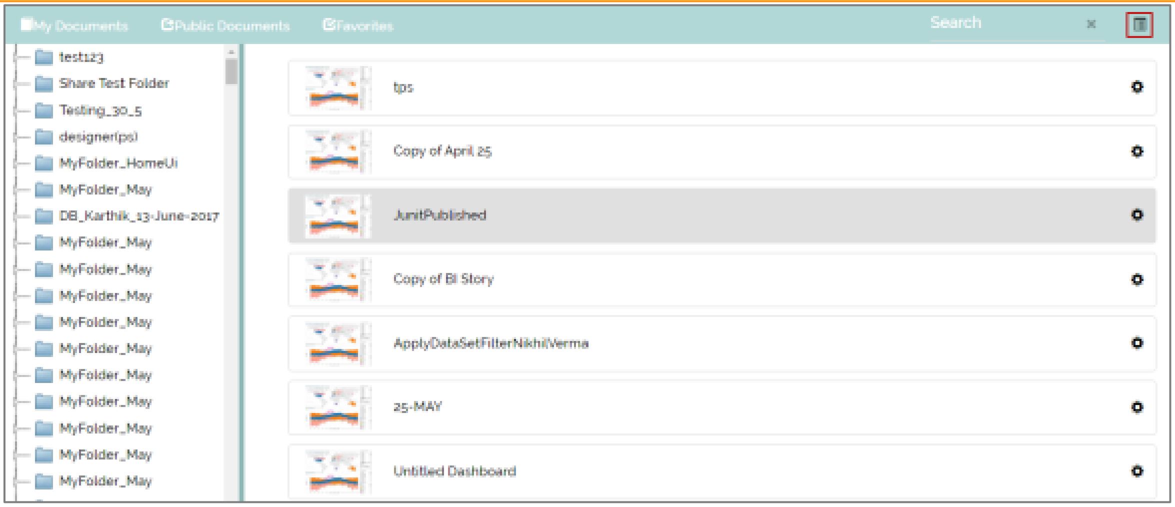
4.2.6. Navigation Bar

Users can search for an existing document by typing the title of the document in the ‘**Search**’ box.
E.g. The following image displays all the documents containing the word **“New”** in the title:

4.2.7. Displaying and Ordering Documents

The following features are provided to arrange and display various platform documents:

- **List Panel:** Click ‘**List**’ icon  to display all the documents in the tree structure.

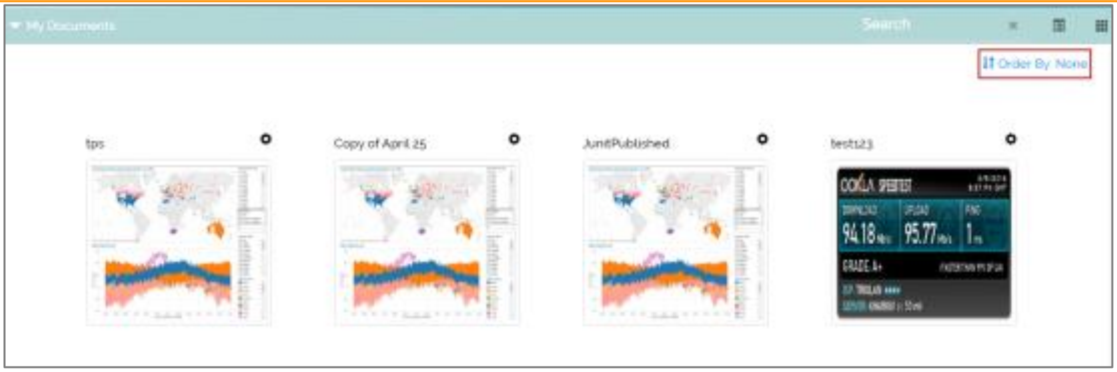


Note: The ‘**List View**’ does not display documents stored in ‘**Favorites**’.

- **Grid Panel:** Click ‘**Grid**’ icon to display all the documents in a grid view (the default view to display platform documents).

- **Document Ordering:** This feature allows users to sort documents in the portal home screen. There are three sorts of options: **Alphabetical/Name (Ascending and Descending), Date (Ascending and Descending), and Custom**.

  i) Click ‘**Order By**’.

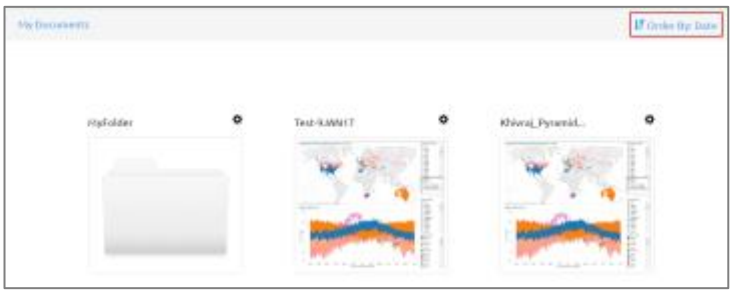


ii) A context menu opens with the following sorting options:

a. Name: Users can sort documents by their name in ascending or descending order.
b. Date: Users can sort documents by date by using this option.
c. Custom: Users can manually drag and change the order of documents by selecting this option.

iii) Select an option from the context menu.

iv) The platform documents will be sorted as per the selected order.
E.g. The following image shows documents categorized by date.



Note:

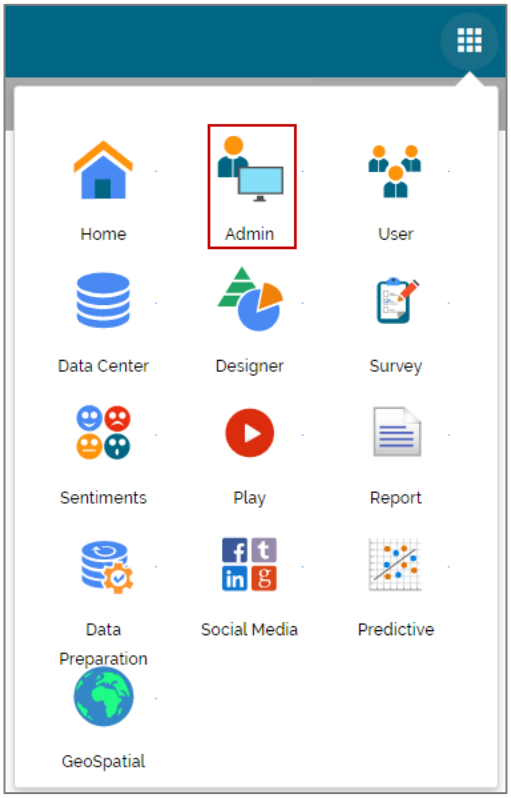
a. The documents saved under **'My Documents'** are displayed by default on the Platform home page.
b. A **'Search Bar'** has been provided on the Platform homepage to search the specific folders and files.
c. Documents will be sorted in ascending order by default, users need to click on the 'Name' option again to sort the documents in the descending order.

5. Administration

The entire BizViz Platform can be managed through this module. It controls all the general and user-specific configuration settings for various plugin applications provided in the platform.

5.1. Accessing the Administration Module

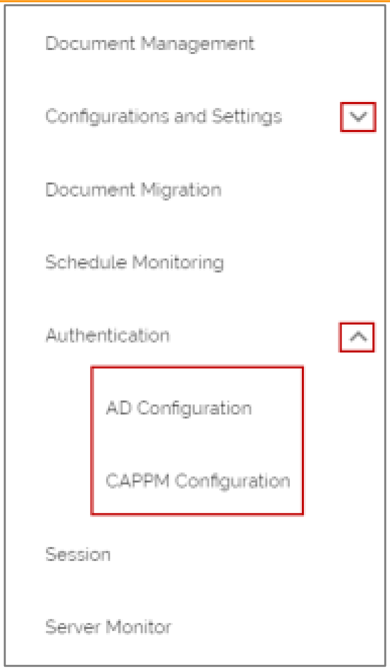
i) Navigate to the Platform home page.
ii) Click **'Apps'** menu
iii) A menu containing all the plugins will be displayed.
iv) Select and click the **'Admin'** plugin.



v) Users will be directed to the '**Administration**' page.

vi) Various administration options will be displayed on the left side of the page.

vii) Click the drop-down sign ⌄ provided next to the concerned admin option to display the sub categories for the same.



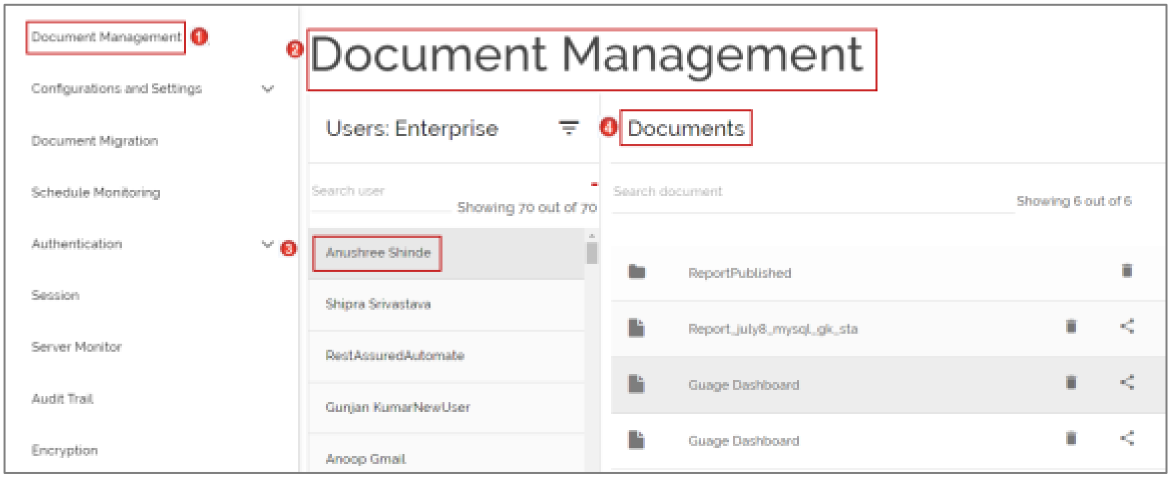
5.2. Administration Options

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

5.2.1. Document Management

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

i) Click '**Document Management**' option from the Administration Page.
ii) Users will be directed to the '**Document Management**' window.
iii) Select a user from the '**Users**' list.
iv) A list of documents created by that user will be displayed.



Icon	Name	Description
	Share Document/ Exclude User	Redirects the user to share the selected document using '**Share With**' option provided under Properties (When a document is not shared) **OR** Excludes users from the rights to access the document (in case if a document is shared with user/s)
	Delete Document	Removes the document from the list

Note:

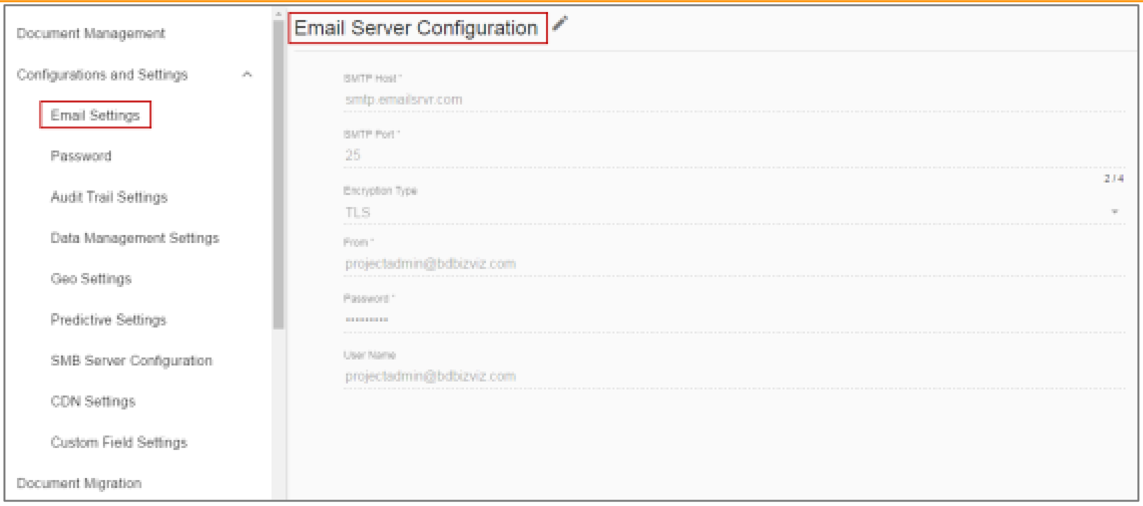
a. The administrator must exclude users from a shared document before deleting the document.
b. Share/Exclude options can be applied only to the files, the folders available under the '**Document Management**' module can't be shared/excluded.

5.2.2. Configurations and Settings

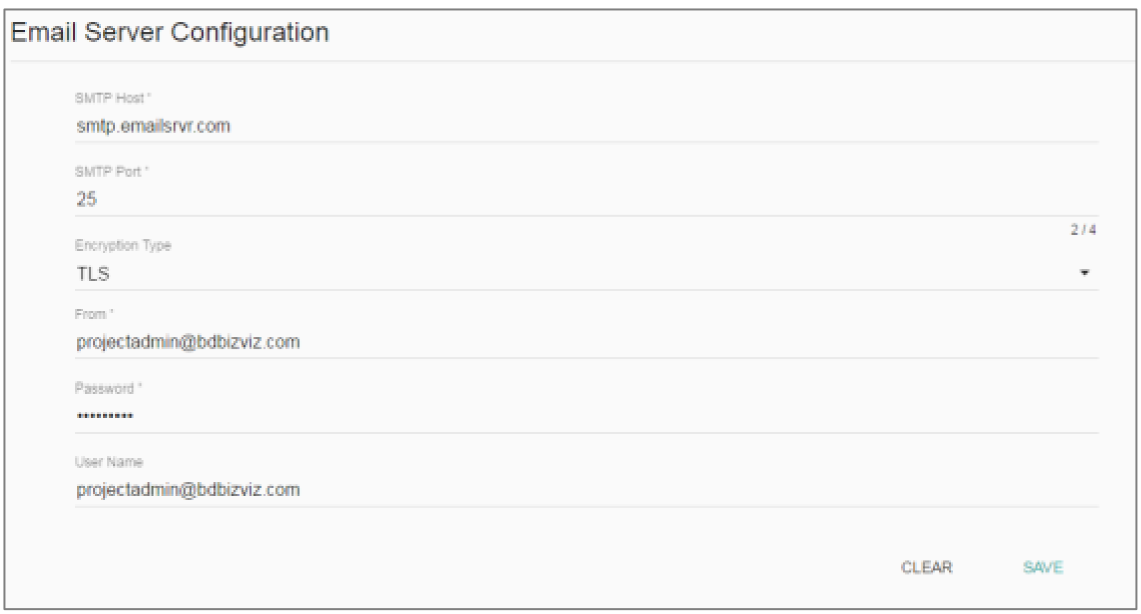
This section covers configuration details for various platform plugins.

5.2.2.1. Email Settings

a. Click '**Configuration and Settings**' from the Admin options list.
b. Various configuration options will be listed below.
c. Click '**Email Settings**' from the list.
d. The '**Email Server Configuration**' window will be displayed.
e. Click the '**Edit Configuration**' option



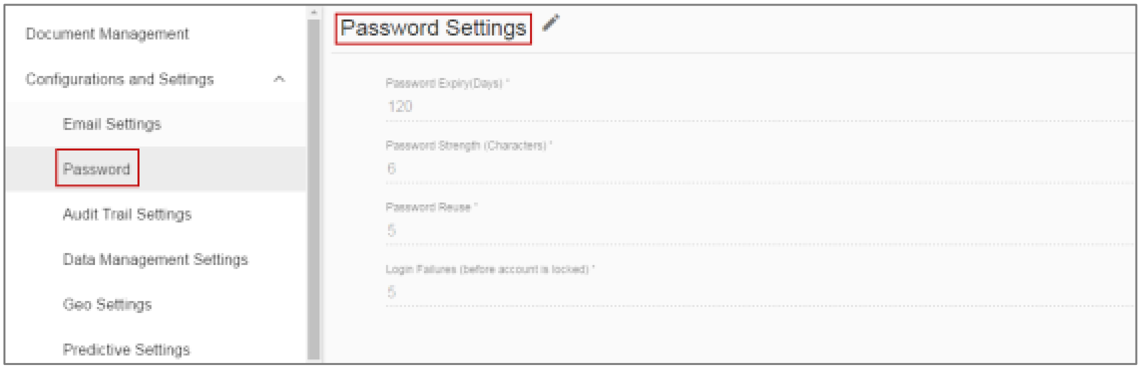
f. Fill in the following information:
   - **SMTP Host**: SMTP host address
   - **SMTP Port**: Port number of SMTP
   - **Encryption Type**: Select an encryption type from the drop-down menu
   - **From**: Enter authenticated credentials of the sender
   - **Password:** Provide the password
   - **User Name**: Name that will be displayed to the receivers



g. Click ‘**SAVE**’ to save the configuration details.
h. Click ‘**CLEAR**’ to erase the entered configuration details.

5.2.2.2. Password

a. Click ‘**Password**’ from the ‘**Configuration and Settings**’ sub-menu.
b. The ‘**Password Settings**’ page will be displayed.
c. Click the ‘**Edit Configuration**’ option



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

e. Click '**SAVE**' to save the settings.

f. Click '**CLEAR**' to erase the entered configuration details.

Note:

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

b. A user can login with the same password only when the administrator enables the user again.
   (The password must be a combination of alphabetical letters, numerical figure, and a special character. **E.g.** Admin1@)

5.2.2.3. Audit Trail Settings

Audit Trail enables the administrator to keep a record of significant events on servers and applications. It provides information regarding what is being accessed, how it's being accessed or changed and, who is performing these operations.

This section contains two options:

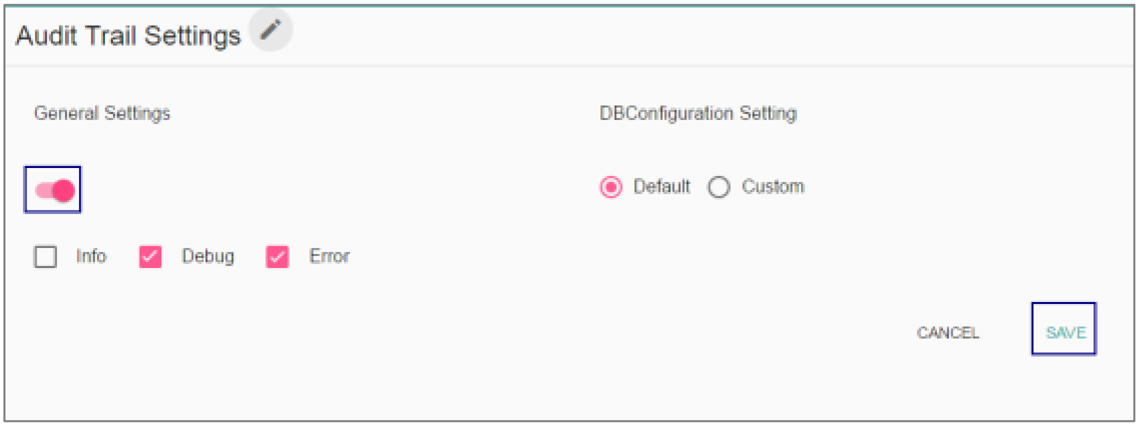
- **General Settings**

  This option is provided to enable or disable Audit Trail settings.

  a. Select any one option out of the following:
     i. **Info**: It captures information about all the events.
     ii. **Debug**: It enables the admin to debug the errors.
     iii. **Error**: It helps admin to identify the errors so that they can be fixed.

  b. Use Enable/Disable button to enable the settings.

  c. Click '**SAVE**'.



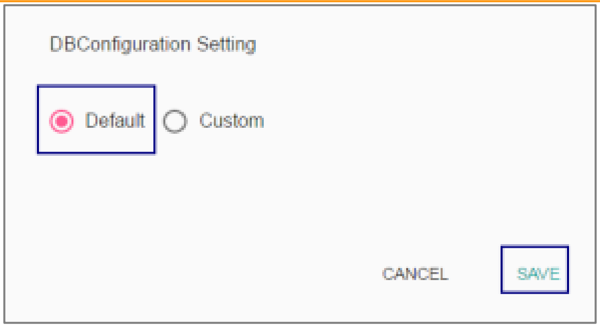
Note: There is a single '**Save**' button provided for both the Audit Trail options.

- **DB Configuration Settings**

  This section is provided to configure Database/ BizViz Repo Database settings.

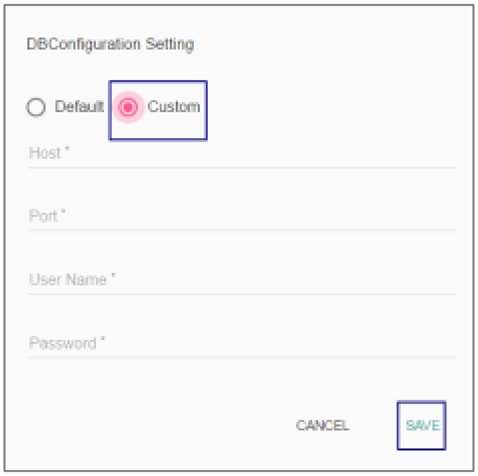
  There are 2 ways to configure database settings:

  a. **Default**
     i. Select '**Default**'
     ii. Click '**SAVE**'



iii. The metadata will be stored in the default database (MySQL Enterprise 5.6).

b. **Custom**
   i. Select ‘**Custom**’
   ii. Fill in the following information:
   - Host
   - Port
   - User Name
   - Password
   iii. Click ‘**SAVE**’



iv. The metadata will be stored in the configured database.

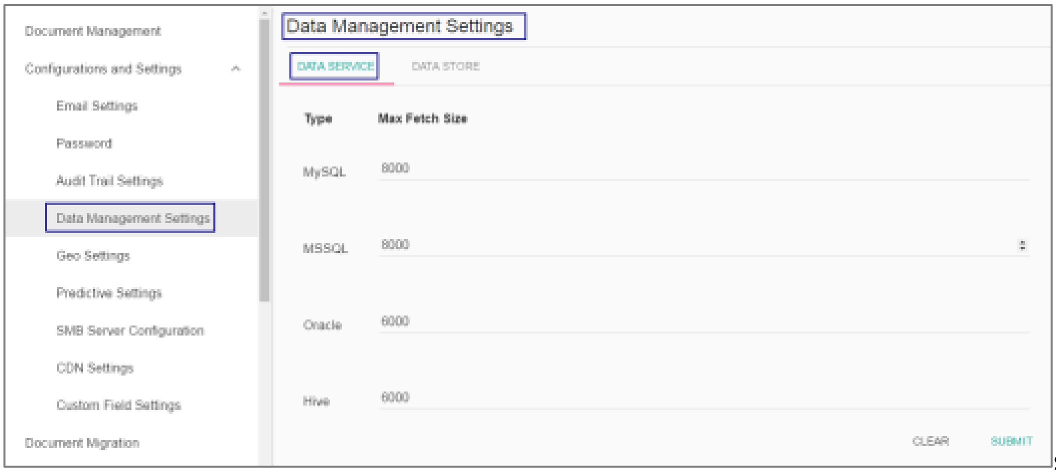
Note: Click **‘CANCEL’** to undo the audit trail settings.

5.2.2.4. Data Management Configuration

The ‘**Data Management Settings**’ helps users set the Maximum Fetch Size of the Data Connectors used for Data Services and Data Stores.

- **Data Service**
  This option displays maximum fetch size value for all the available Data Service types.
  a. Select a data service option from the list.

b. Set/Re-set ‘**Maximum Fetch Size**’ value.
c. Click ‘**SUBMIT**’



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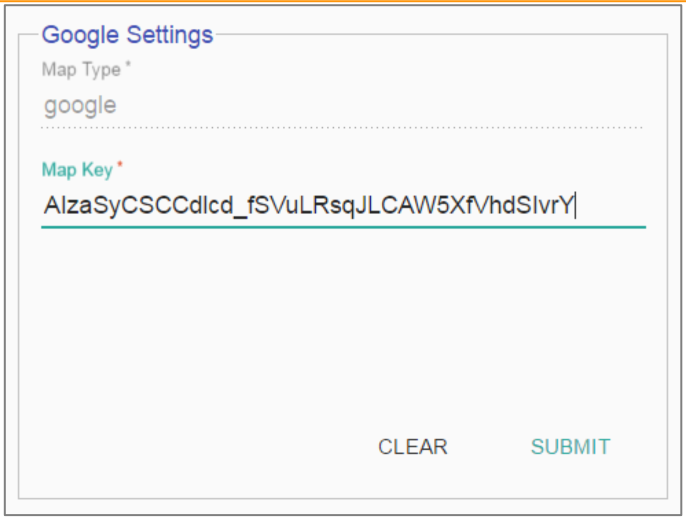
- **Data Store**
  This option displays maximum fetch size for all the Data Connectors in regard of Data Stores.
  a. Click ‘**Edit**’
  b. Set/Re-set ‘**Maximum Fetch Size**’ value for all data connector.
  c. Click ‘**SUBMIT**’

Note: Click ‘**CLEAR**’ to undo the selected values.

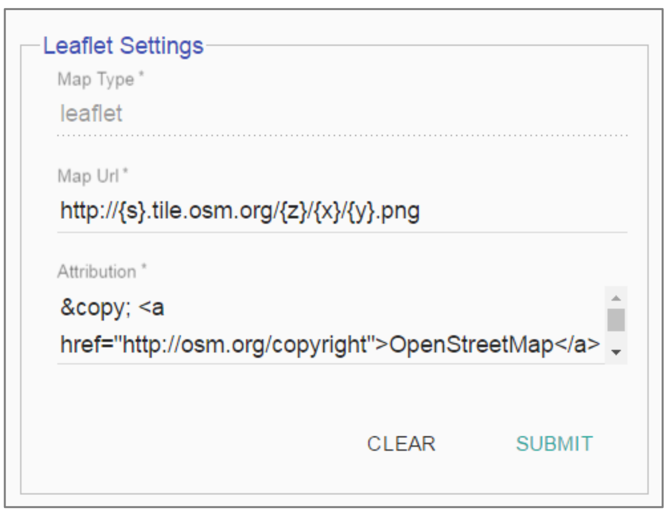
5.2.2.5. Geo Settings

This section explains steps to configure the Geospatial plugin. Two types of Map settings are provided here:

- **Google Settings**
  a. Fill in the following information:
    i. **Map Type**: It will be preselected.
    ii. **Map Key**: Enter the map key that has been provided by Google (To be purchased from Google).
    iii. Click ‘**SUBMIT**’

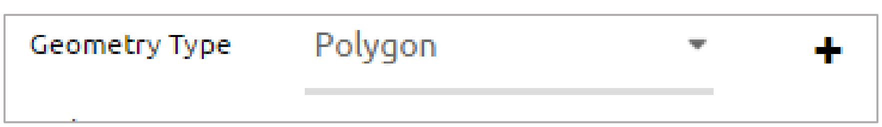


- **Leaflet Settings**
  a. Fill in the following information:
     i. **Map Type:** It will be preselected
     ii. **Map Url:** URL of the selected map (provided by the open-source vendors)
     iii. **Attribution:** Configuration parameters for the map (provided by the open-source vendor)
     iv. Click ‘**SUBMIT**’



- **Uploading a Geo Shape File**

  a. Click ‘**Add**’ button + provided next to the ‘**Upload Geoshape File**’.



  b. ‘**Upload Geo Shape File**’ fields will be displayed.
  c. Enter the following information:
     i. **Name:** Title for the map

ii. **Geometry Type**: Select anyone Geometry type from the drop-down menu (out of ‘**Polygon**’ or ‘**Line**’)

iii. **Shape File**: Browse a shapefile from the system and upload (Only ‘**json** ’and ‘**js**’ formats are supported)

d. Click ‘**SUBMIT**’

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

f. All the uploaded Geo Shapefiles will be displayed in the list format.

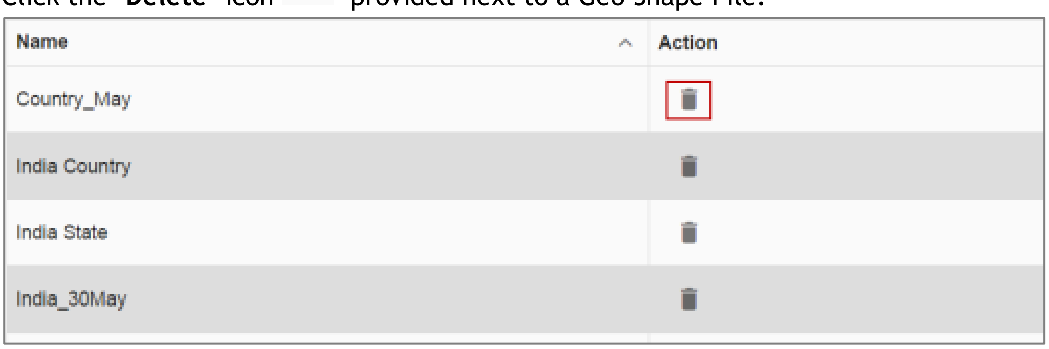
g. Select a Geometry Type using the check-box.

h. Use ‘**Search Shape**’ space to search a Geo Shapefile.

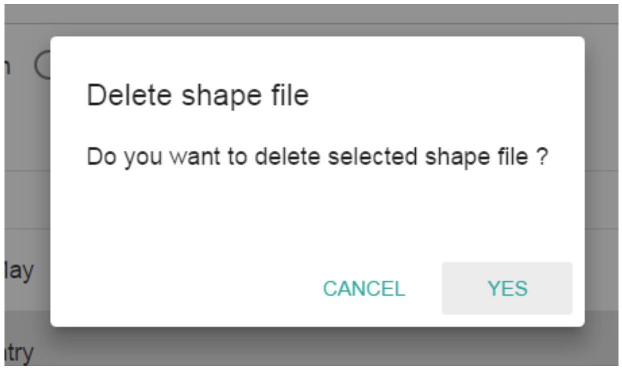
- **Deleting a Geo Shape File**

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

b. Click the ‘**Delete**’ icon  provided next to a Geo Shape File.



c. A new window will pop-up to confirm the deletion.
d. Select '**YES**'

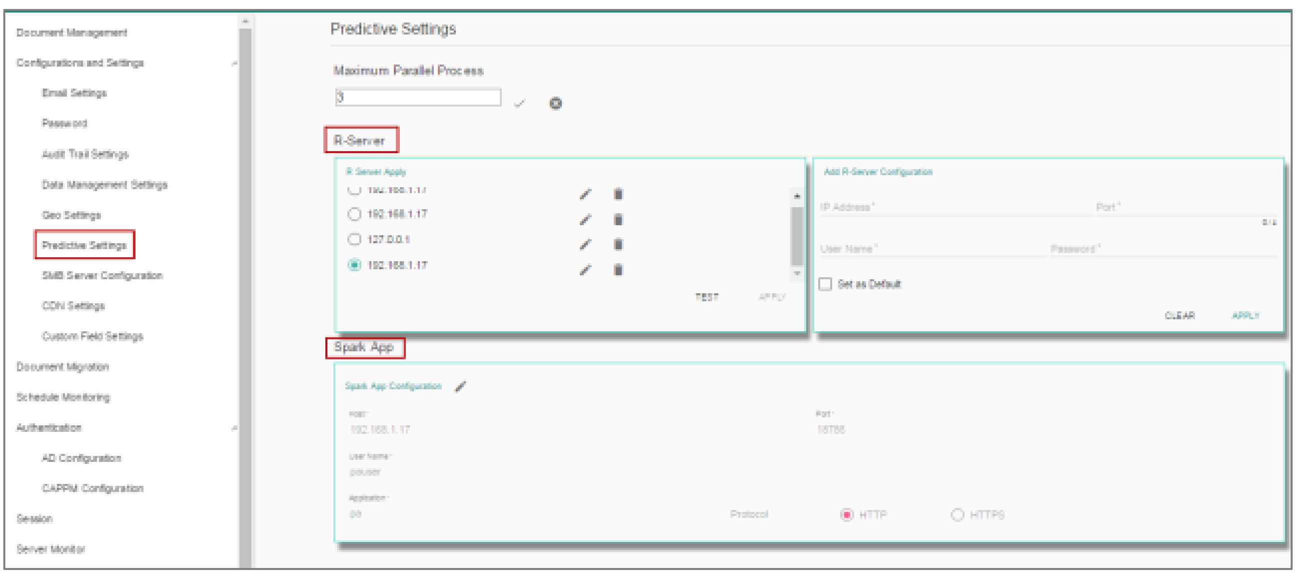


e. The selected Geo Shapefile will be removed from the list.

5.2.2.6. Predictive Settings

This section explains R-Server Configuration and Predictive Spark App Settings details for the Predictive Analysis plugin of the BizViz Platform.

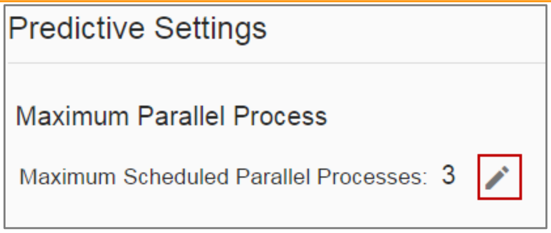
a. Click the '**Predictive Settings**' option from the list of admin options.
b. Users will be directed to a window displaying R-Server and Spark App configuration details.



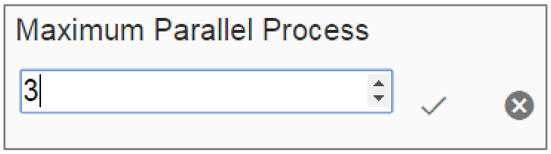
- **Steps to Schedule Maximum Parallel Process**

a. Navigate to the '**Predictive Settings**' page.

b. Click the '**Edit**' icon  provided to modify the '**Maximum Parallel Process**' option.



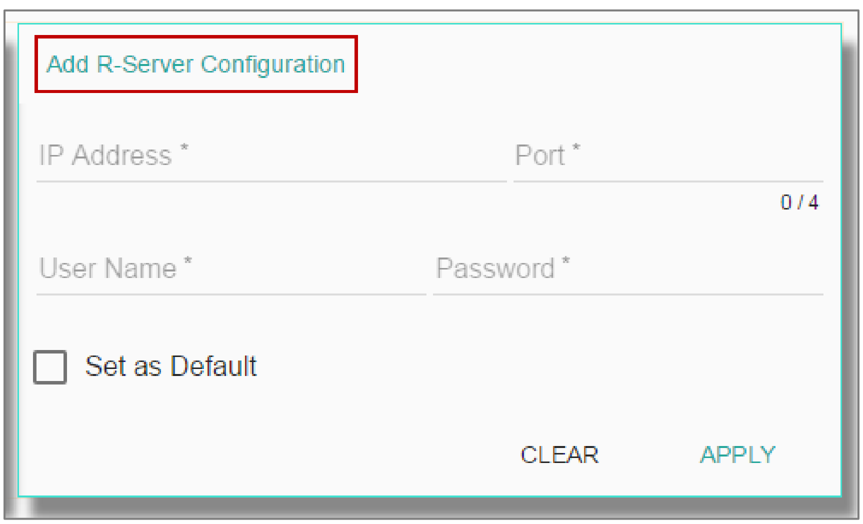
c. Set/Reset a number to indicate the maximum scheduled parallel processes.



d. Click the ‘**Check Mark**’ to apply the selection.

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

a. Navigate to the ‘**Predictive Settings**’ page.
b. Select the ‘**Add R Server Configuration**’ window.
c. Fill in the following information:
   i. IP Address: IP address of the R-server
   ii. Port: R-Server’s port number
   iii. User Name: Enter a username to log in to the R- server
   iv. Password: Enter the password for the above username
   v. Set as Default: Select this option by using a check mark in the box
d. Click ‘**APPLY**’ to save the R-server configuration details.

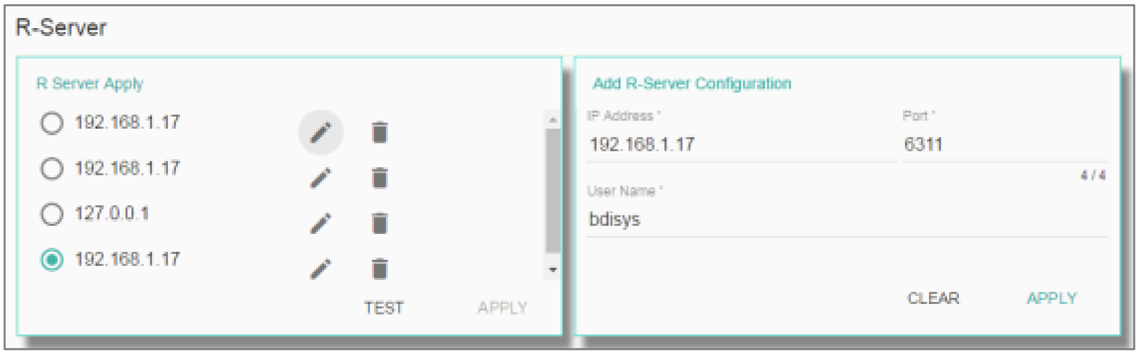


e. A message will pop-up to ensure that a new R-Server has been created.

Note: The newly created R-Server will be added in the R-Server list displayed under ‘**R-Server Apply**’ window.

- **Editing the R-Server Details**

  a. Navigate to the '**R-Server Apply**' window.
  b. Click the '**Edit**' icon provided next to an R Server link.
  c. Configuration details of the selected R-server will be displayed.
  d. Edit the required details.
  e. Click '**APPLY**' to save the changes.



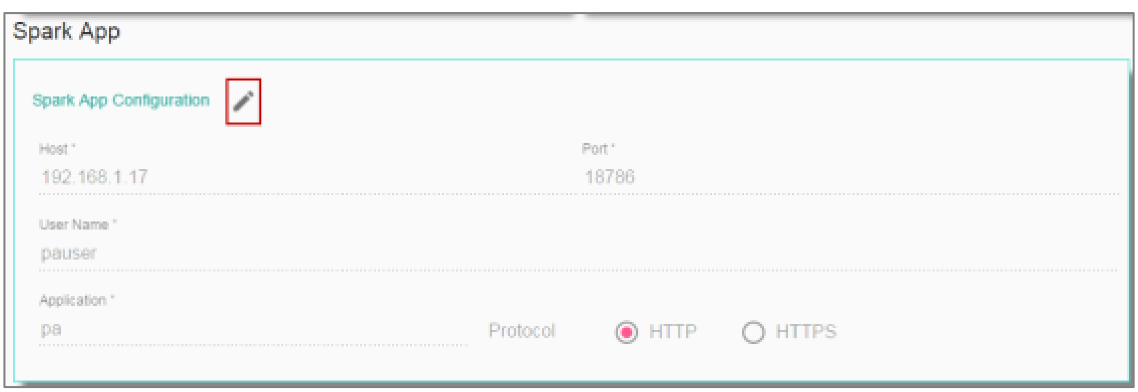
Note:

a. The Administrator can configure multiple R-Server, but process will execute on single server at a time.
b. Click '**CLEAR**' to erase the information from the R-Server Configuration fields.
c. The admin needs to provide a working directory while configuring the R server and users should be given read and write permission to that directory.

- **Predictive Spark App Settings**

  Users can also configure the Predictive Spark Application settings via the Administration module.

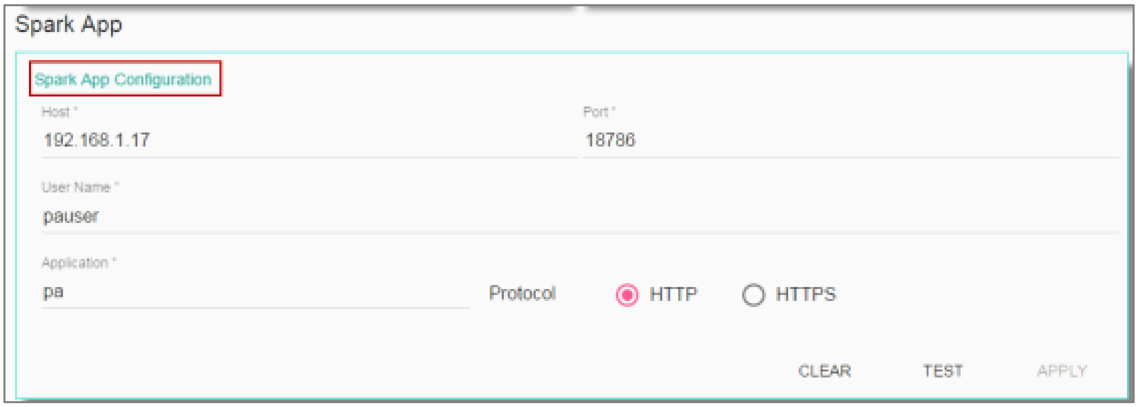
  a. Click '**Predictive Settings**'.
  b. The '**Spark App Configuration**' fields will be displayed.
  c. Click the '**Edit**' option provided next to the Spark App Settings Configuration fields.



  d. Provide the following information:
     i. Host

ii. Port
iii. User Name
iv. Application
v. Protocol

e. Click ‘**TEST**’ to check the connection.
f. A message will pop-up to assure about the connection.
g. Click ‘**APPLY**’

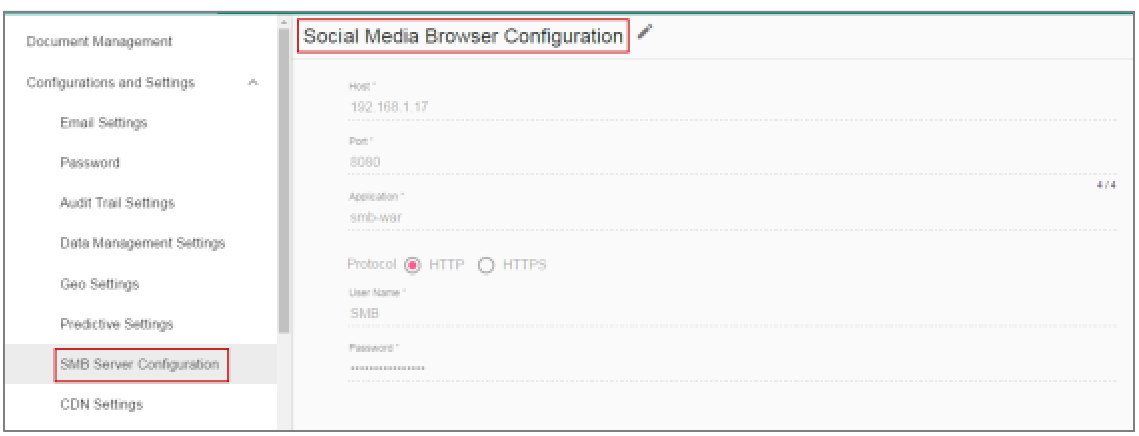


Note: Click ‘**Clear**’ to erase the Spark App Configuration details.

5.2.2.7. SMB Server Configuration

This section covers Social Media Browser configuration details.

a. Click ‘**SMB Server Configuration**’ from the ‘**Configuration and Settings**’ list.
b. The ‘**Social Media Browser Configuration**’ fields will be displayed.
c. Click the ‘**Edit**’ icon

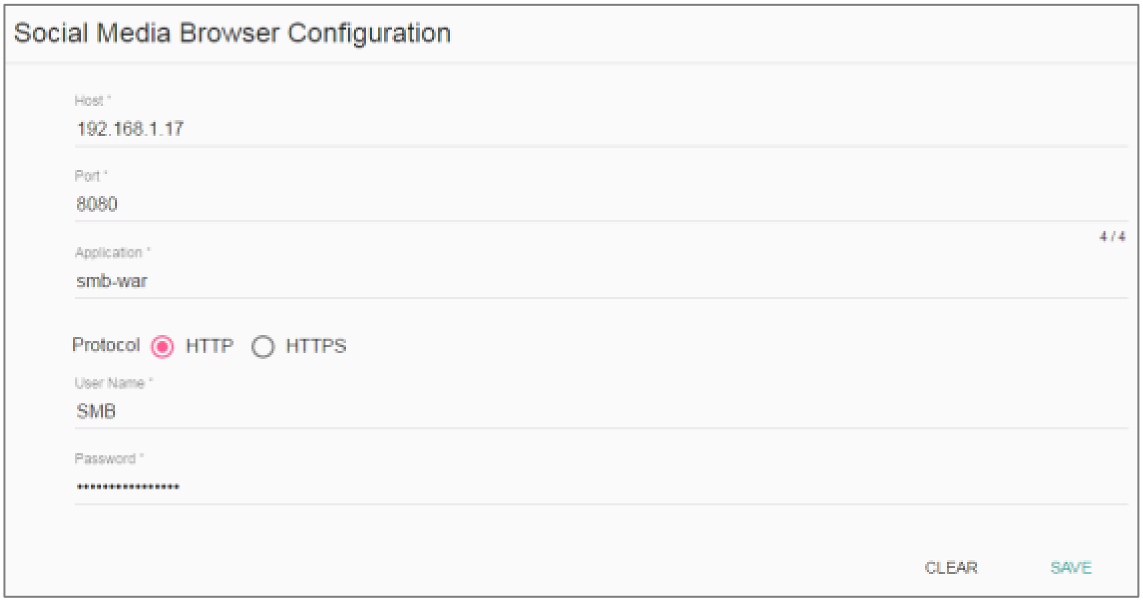


d. Fill in the following information:

vi. Host
vii. Port
viii. Application

ix. Protocol
x. User Name
xi. Password

e. Click ‘**SAVE**’

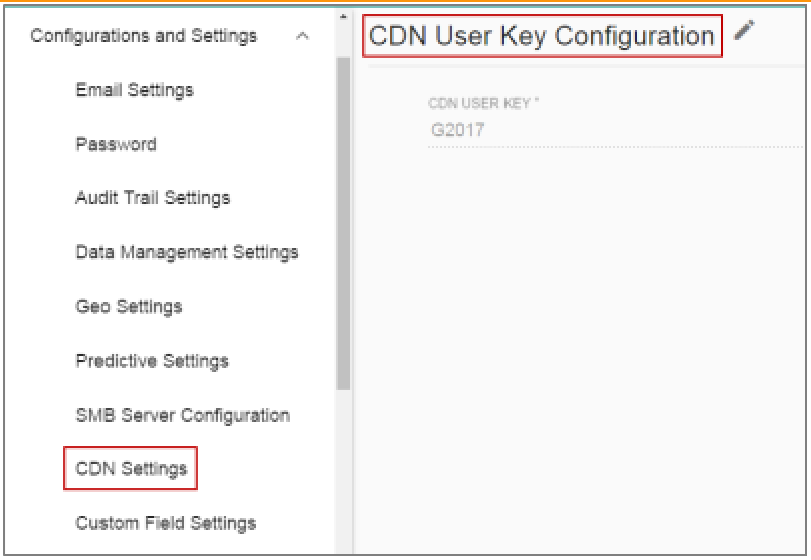


f. A message will pop-up to assure that the connection has been saved.

5.2.2.8. CDN Settings

This section configures the Content Delivery Network settings for faster data loading of the platform applications worldwide.

a. Click ‘**CDN Settings’** from the **‘Configuration and Settings’** list.
b. The ‘**CDN User Key Configuration**’ field will be displayed.
c. Click the ‘**Edit**’ icon



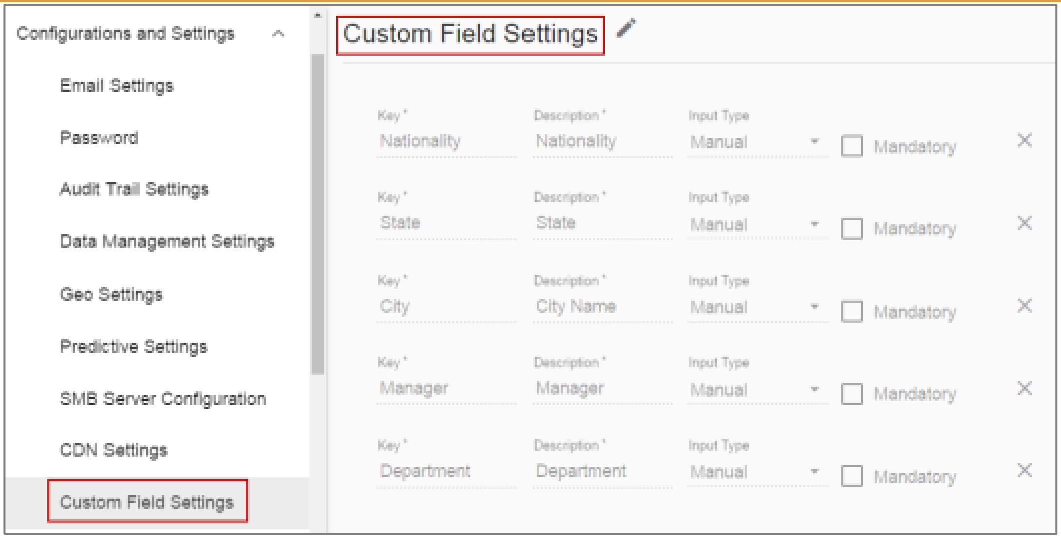
d. Enter the CDN user key in the given space.
e. Click ‘**SAVE**’

Note: Click ‘**CLEAR**’ to erase the CDN user key.

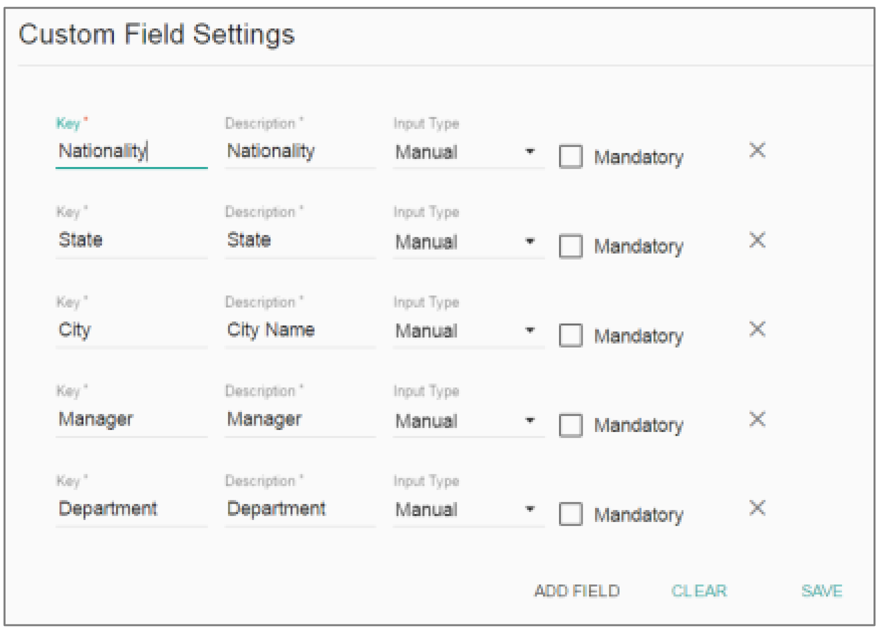
5.2.2.9. Custom Field Settings

This section configures the custom fields settings that can later be added to user groups and assigned to the users of those groups.

a. Click ‘**Custom Field Settings**’ from the ‘**Configuration and Settings**’ list.
b. Users will be directed to the Custom Field Settings window.



c. Click the '**Edit**' icon
d. Change the required custom field details.
e. Click '**SAVE**' to save the inserted custom fields.



Note:

a. Click '**ADD FIELD**' to add a new custom field.
b. Click '**CLEAR**' to erase the entered custom field details.
c. Click the '**Remove Field**' icon to remove a custom field.

5.2.3. Document Migration Settings

This section explains step by step process for document migration.

1. **Document Migration Login**

i) Select '**Document Migration**' from the list of admin options.

ii) Fill in the following information:

a. **Source Domain Name:** Enter address of the destination server.

b. **Email:** Enter email address of the account from where document is to be shared.

c. **Password:** Enter password of the account.

d. **Domain:** Select the desired domain from the drop-down menu.

iii) Click '**Login**'.

2. Select Source Document

i) Clicking on '**Login**' users will be redirected to the below-given page.

ii) A list of the available files (source documents) under the Logged-in account will be displayed.

Note: '**My Documents**' opens by default with the list of source documents.

3. Steps to Migrate

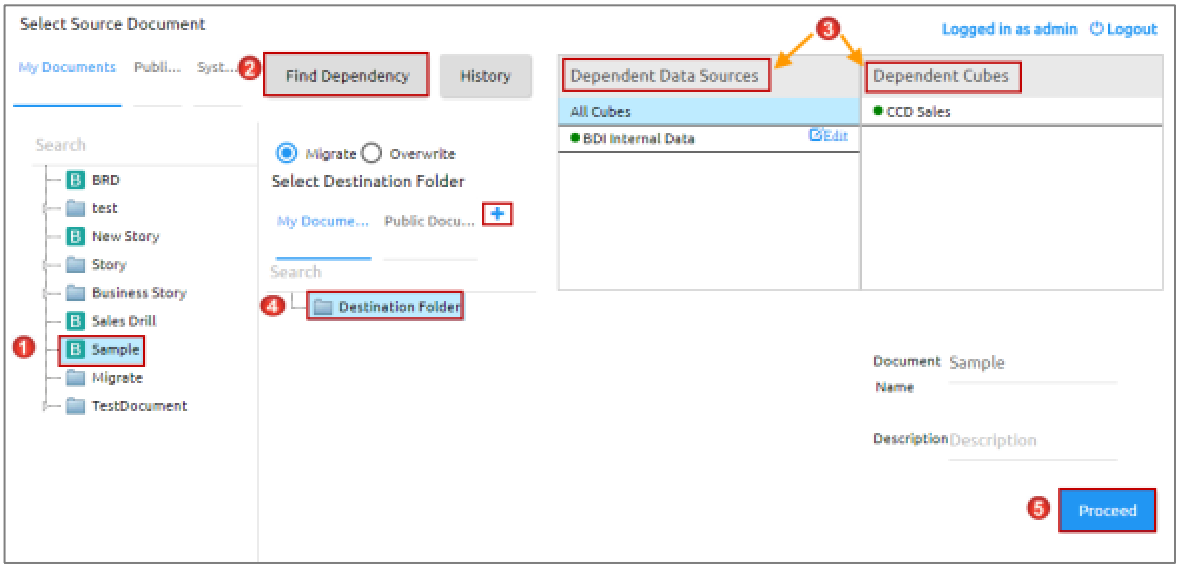
i) Select a file from the list of source documents.

ii) Click '**Find Dependency**'.

iii) Dependent Data Sources and Cubes/Data Services will be displayed.

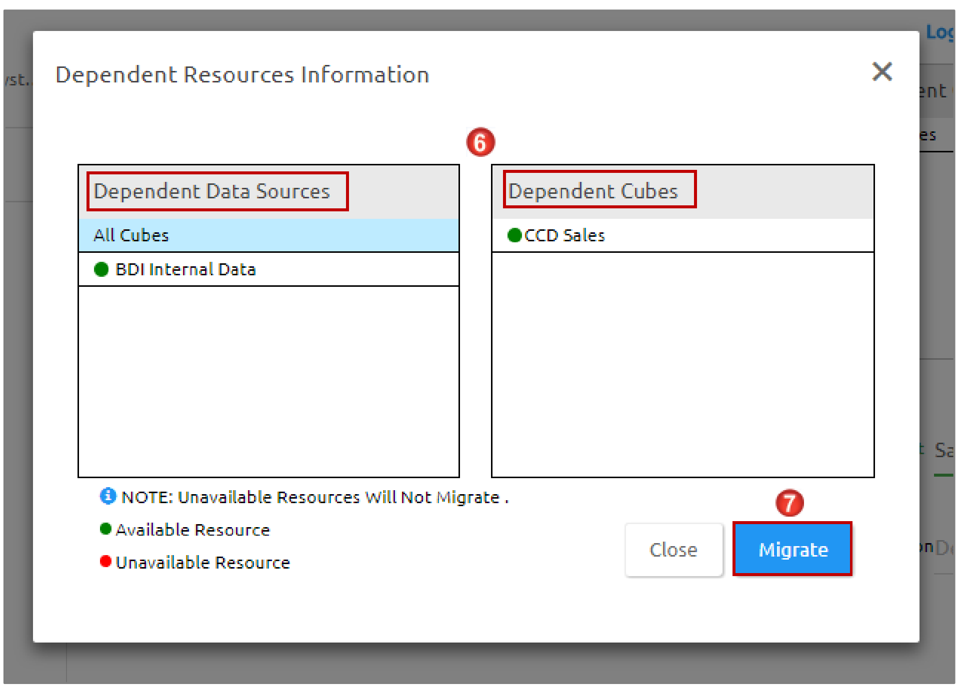
iv) Click the ‘**Add**’ option ➕ to create a new folder in the destination account.
OR
Select an existing folder as a destination folder.

v) Click ‘**Proceed**’.



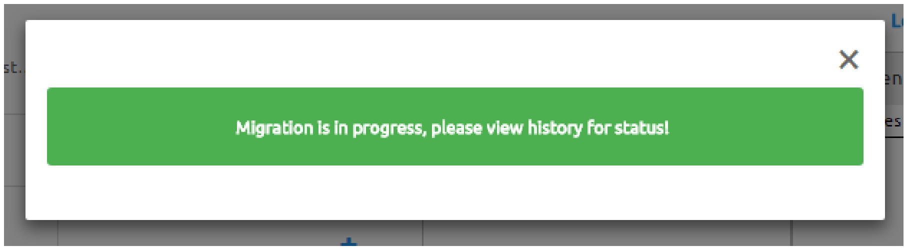
vi) A new window will pop-up displaying information about the dependent resources.

vii) Click ‘**Migrate**’.



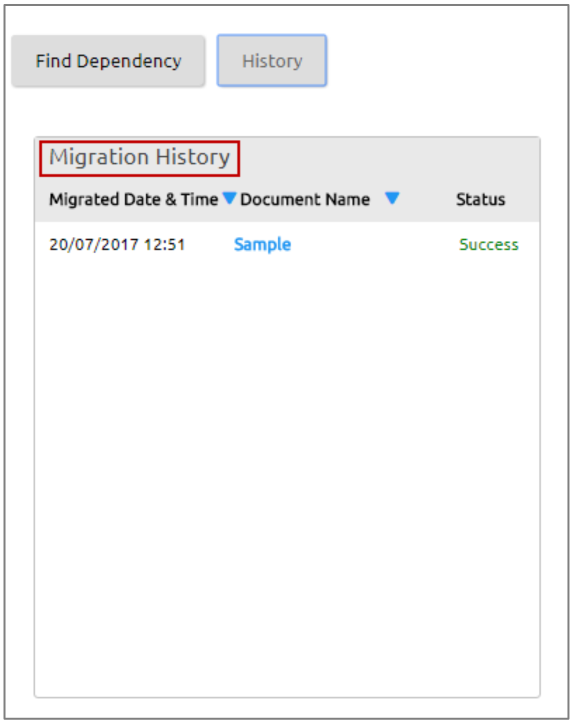
4. View Migration History

i) On clicking the ‘**Migration**’ option a new message pops-up redirecting user to view the migration status.



ii) Click **'History'** on the Select Source Document page**.**

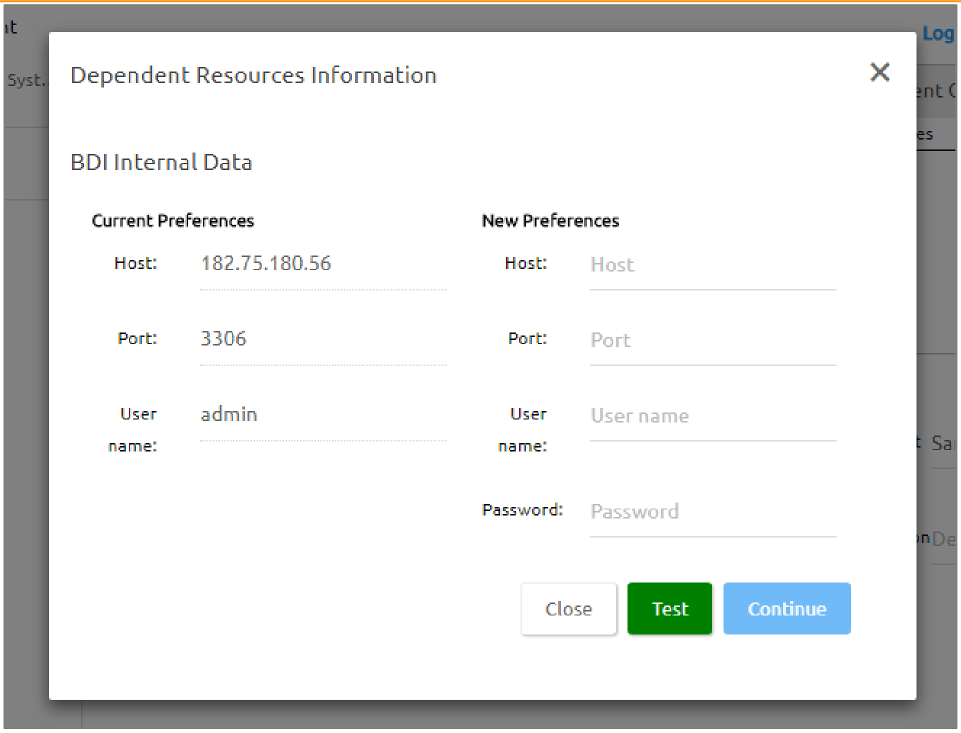
iii) Users will be redirected to a pop-up window displaying the migration history.



iv) Click on the document for more details.

Note:

a. This feature does not support folder migration.
b. Flat files as source document will display an error message, "**Dependency not found.**" while clicking the '**Find Dependency**' option.
c. If a deleted data connector/dataset/data store is used as source document, then it will display an error while finding dependency.
d. Users can edit the Dependent Data Source information by using the '**Edit**' option provided on the Select Source Document page.

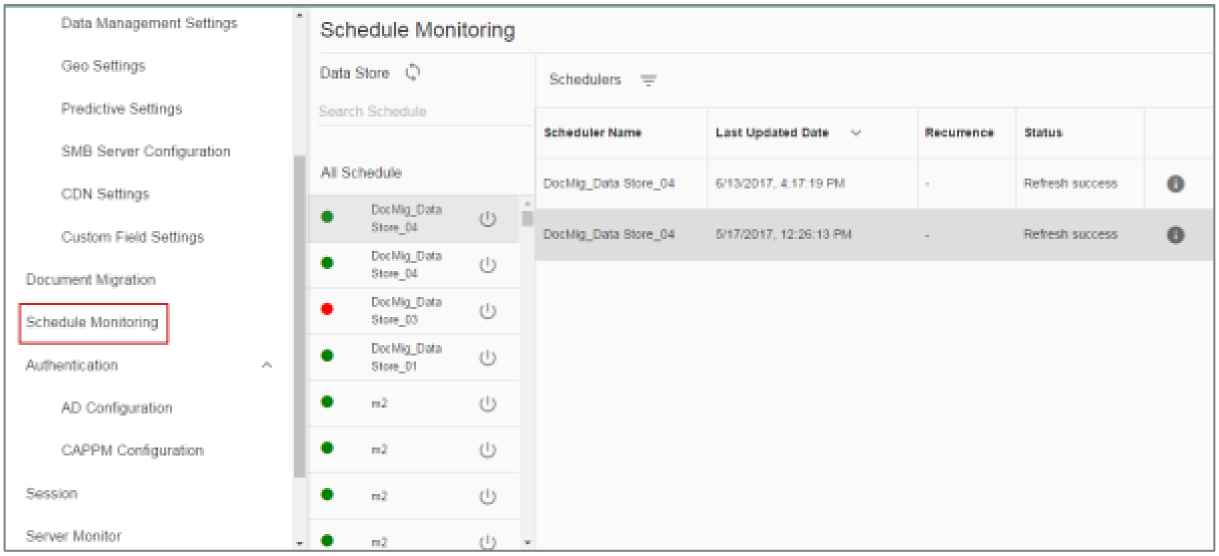


5.2.4. Schedule Monitoring Settings

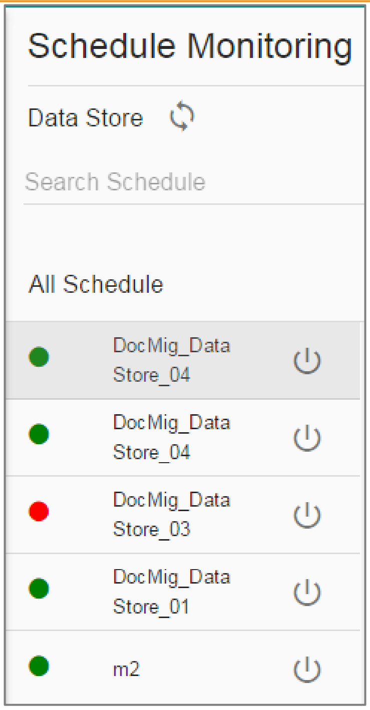
This option helps the administrator to monitor the scheduled data stores.

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

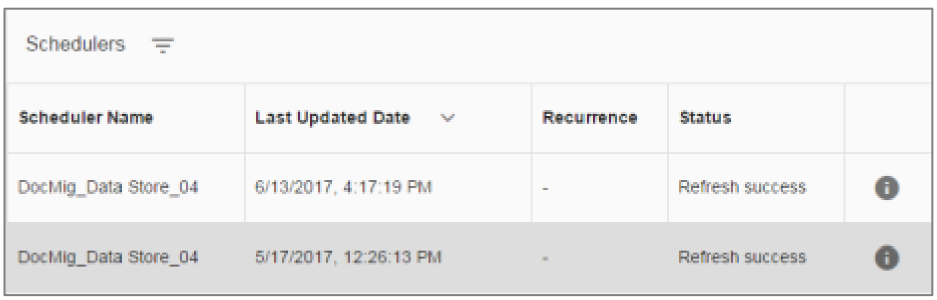
ii) The '**Schedule Monitoring**' window will be displayed.



iii) Search and select a scheduled data store from the '**All Schedule**' list. (Use the '**Search Schedule**' space to search for a scheduled data store.)



iv) Scheduler details are displayed on the right side of the screen.


Schedulers

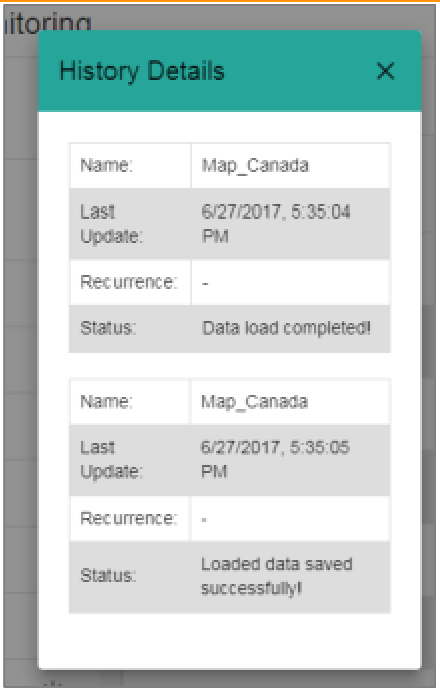
Scheduler Name	Last Updated Date	Recurrence	Status	
DocMig_Data Store_04	6/13/2017, 4:17:19 PM	-	Refresh success	
DocMig_Data Store_04	5/17/2017, 12:26:13 PM	-	Refresh success	

Note:

a. Click the '**Start/Stop**' button to start/stop the scheduler.

b. Click the '**Refresh**' icon to refresh the data store(s).

c. Click the '**Information**' icon to display history details of the selected schedule.



d. Use '**Filter**' option to display filtered details for the selected scheduled job.

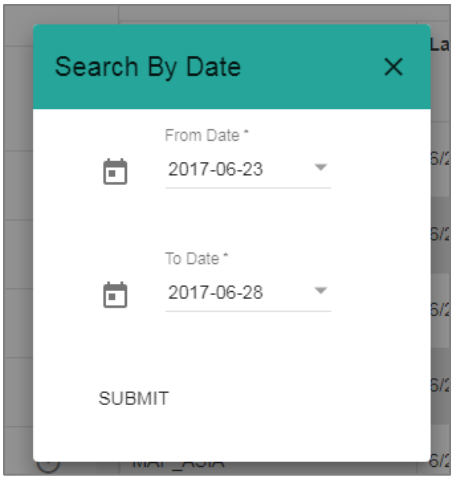
i) Click the '**Filter**' option

ii) A window will pop-up.

iii) Fill the required information:

1. From Date
2. To Date

iv) Click '**Submit**'.



v) The filtered data will be displayed.

Schedulers

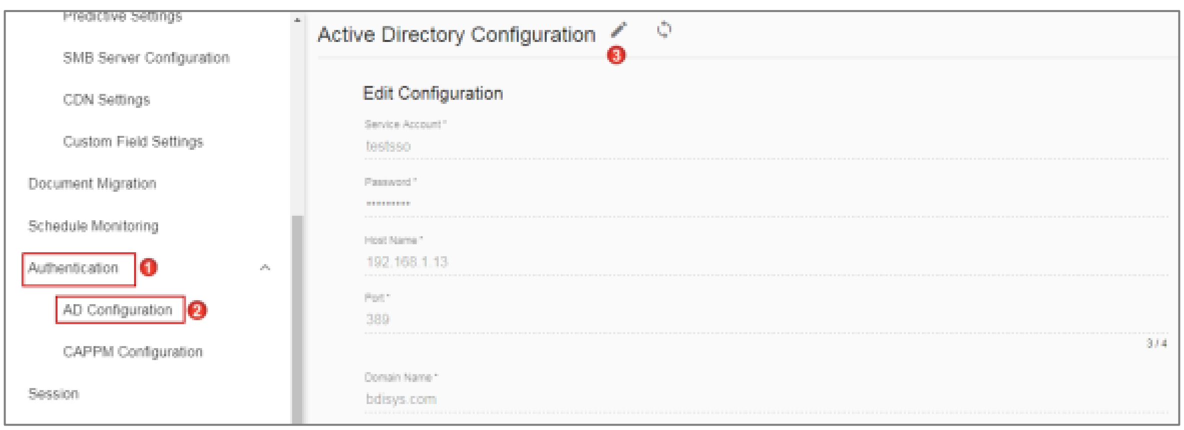
Scheduler Name	Last Updated Date	Recurrence	Status	
Map_Canada	6/27/2017, 5:34:44 PM	-	Refresh success	
TEST_MAP	6/27/2017, 5:21:39 PM	-	Refresh success	
MAP_ASIA	6/27/2017, 5:16:05 PM	-	Refresh success	
New Store	6/27/2017, 12:00:00 PM	6/28/2017, 12:00:00 PM	Scheduler success	
VIVEK_STORE_9_1	6/27/2017, 12:00:00 PM	6/28/2017, 12:00:00 PM	Scheduler success	
May25Mysql	6/27/2017, 12:00:00 PM	6/28/2017, 12:00:00 PM	Scheduler success	
treemap1	6/27/2017, 12:00:00 PM	6/28/2017, 12:00:00 PM	Scheduler success	

5.2.5. Authentication

The administrator can configure windows AD or CA Clarity accounts by applying the below given settings:

5.2.5.1. Active Directory Configuration

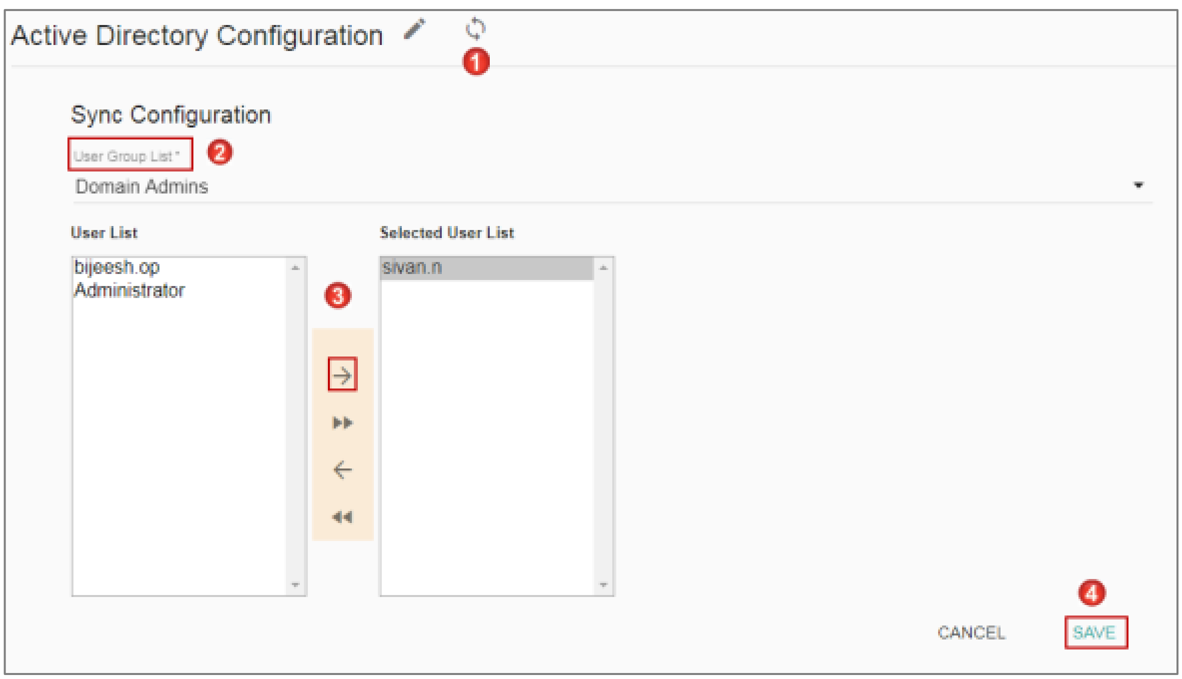
a. Click '**Authentication**' option from the list of admin options.
b. Click '**AD Configuration**' authentication option.
c. Click the '**Edit**' icon provided on the '**Active Directory Configuration**' page.



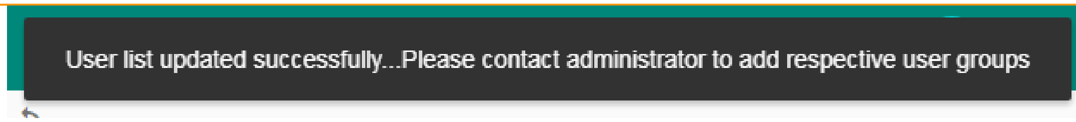
d. Fill in the following information:
- **Service Account:** Name of the Windows AD service account
- **Password:** Secure authentication credential
- **Host Name:** IP address of the Windows AD server
- **Port:** Port number of Windows AD
- **Domain Name:** Enter the Domain Name

e. Click **'Save'**

f. Once you get confirmation that AD details are saved, click the **'Synchronize'** option.
g. Select a user group using the **'User Group List'** drop-down menu.
h. Select and move users from **'User List'** to the **'Selected User List'**
i. Click **'Save'**



j. A pop-up message will appear to assure that the user list has been updated.

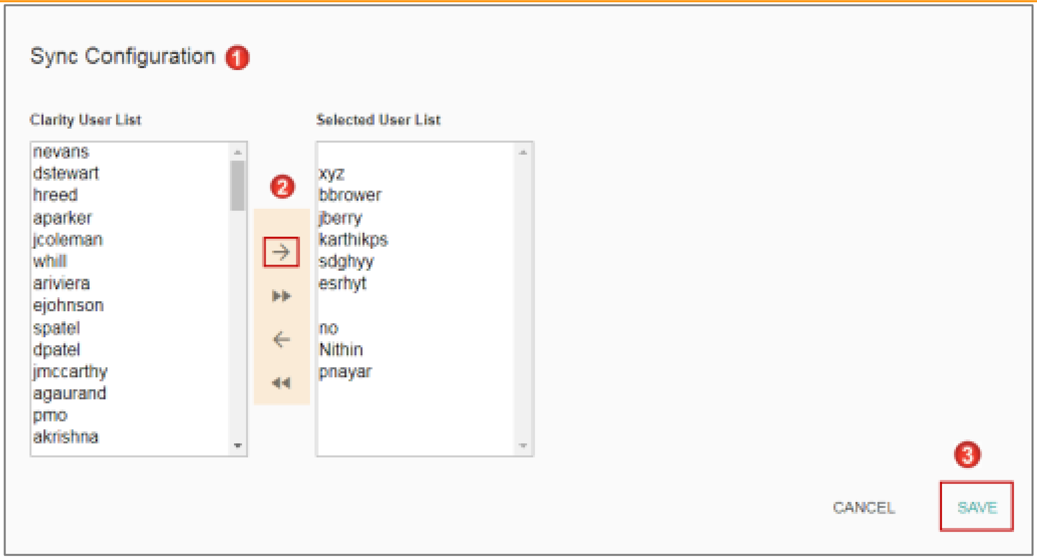


5.2.5.2. CAPPM Configuration

This section explains how to configure Clarity.

a. Select the '**CAPPM Configuration**' using the '**Authentication**' Admin option.
b. Click the '**Edit**' icon provided on the '**CAPPM Configuration**' window.
c. Fill in the required information:
   i. **Username**
   ii. **Password**
   iii. **CA PPM Server:** URL details of the Clarity server (E.g. http://dashboards.xyz.com)
   iv. **User Access NQUERY:** Name of the Query that will fetch a list of the Clarity users
d. Click '**Save**'

e. Once you get confirmation that CAPPM configuration details are saved, click the '**Synchronize**' option.
f. Select a user group using the '**User Group List**' drop-down menu.
g. Select and move users from '**User List**' to the '**Selected User List**'
h. Click '**Save**'



5.2.6. Sessions

This is a new administrative module to display active users.

i) Click '**Sessions**' from the list of Admin options.

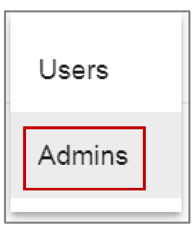
ii) Users will be redirected on the '**Active Admin Sessions**' page.

iii) Click the '**Filter**' icon.

a. A new window pops-up providing 2 filter options:

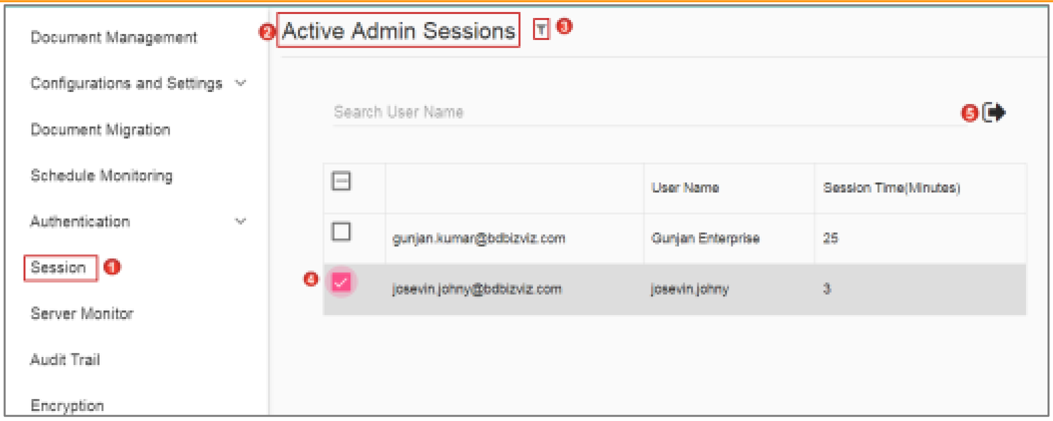
- Users
- Admins

b. Select any one filter option to launch the list of all the active sessions.



iv) Select a session from the list by check marking the box.

v) Click '**Kill Session**' to kill the selected session.

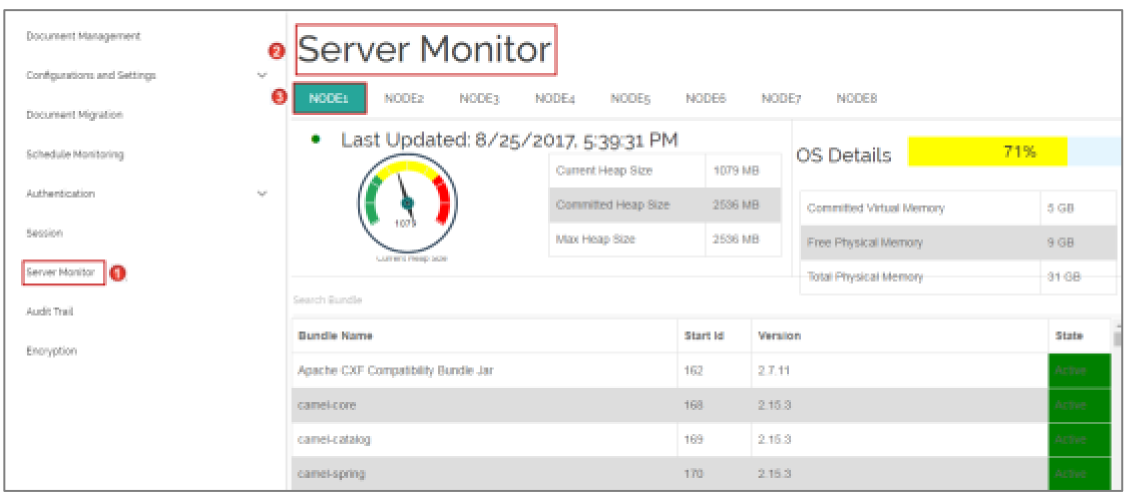


Note: Users to whom the '**Kill Session**' option has been used will be forced to log out their sessions without any notification. The users need to log in again in the platform.

5.2.7. Server Monitor

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

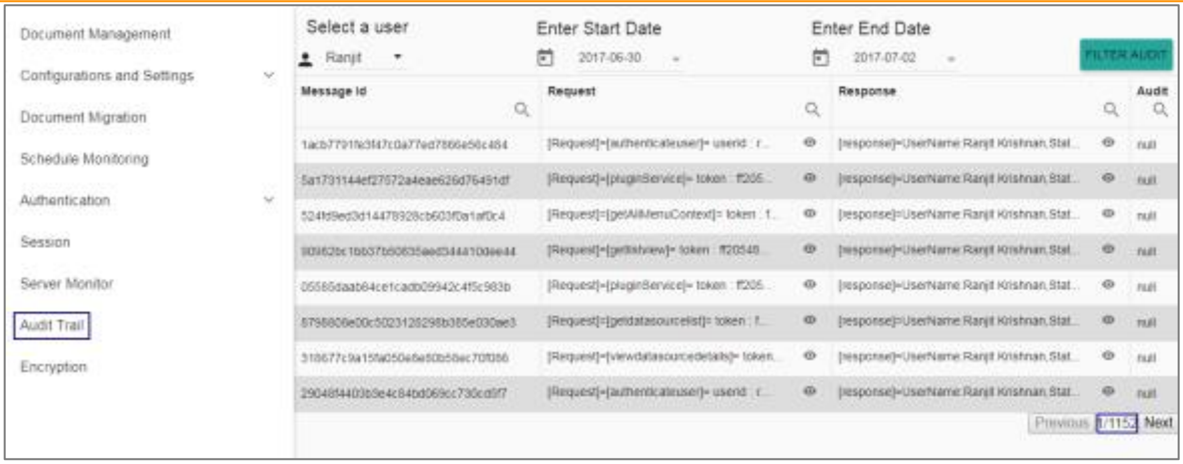
i) Click '**Server Monitor**' from the list of Admin options.
ii) The '**Server Monitor**' page will be displayed.
iii) Select a node to display the node-specific server details.



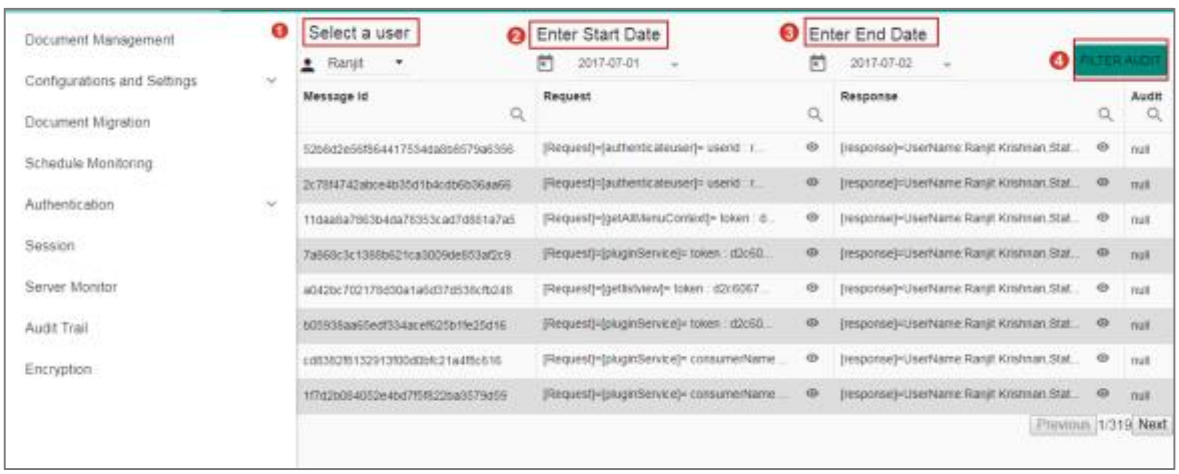
5.2.8. Audit Trail

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

i) Click the '**Audit Trail**' option from the list of admin options.
ii) Users will be directed to a page displaying audit log details.



- **Filter Audit:** Users can filter the audit log details.
  i) Select a user from the drop-down list.
  ii) Select a Start Date from the drop-down list.
  iii) Select an End Date from the drop-down list.
  iv) Click the '**Filter Audit**' option.
  v) The filtered records of the audit log will be displayed in the list.

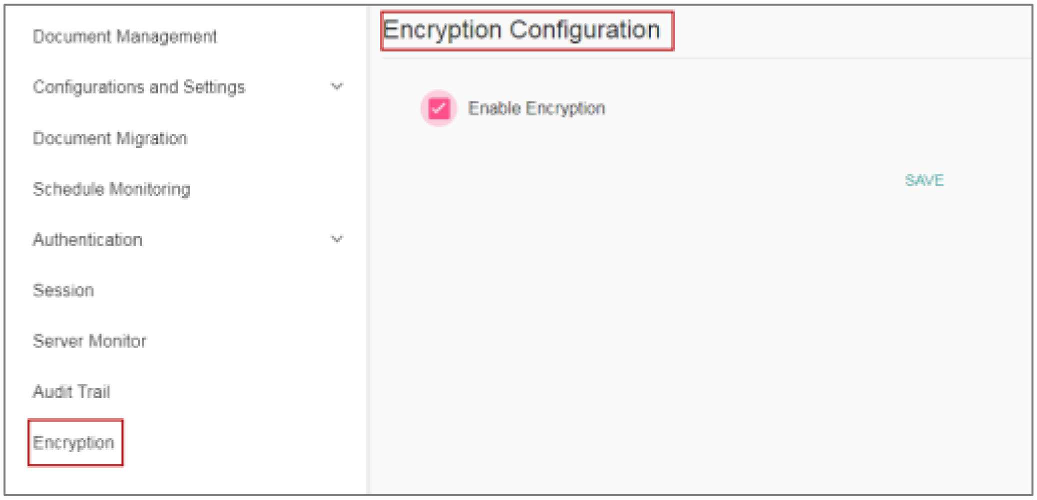


5.2.9. Encryption

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

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

i) Click the '**Encryption**' option from the list of admin options.
ii) Users will be directed to the '**Encryption Configuration**' page.
iii) Enable Encryption by a checkmark in the box.
iv) Click '**Save**'.

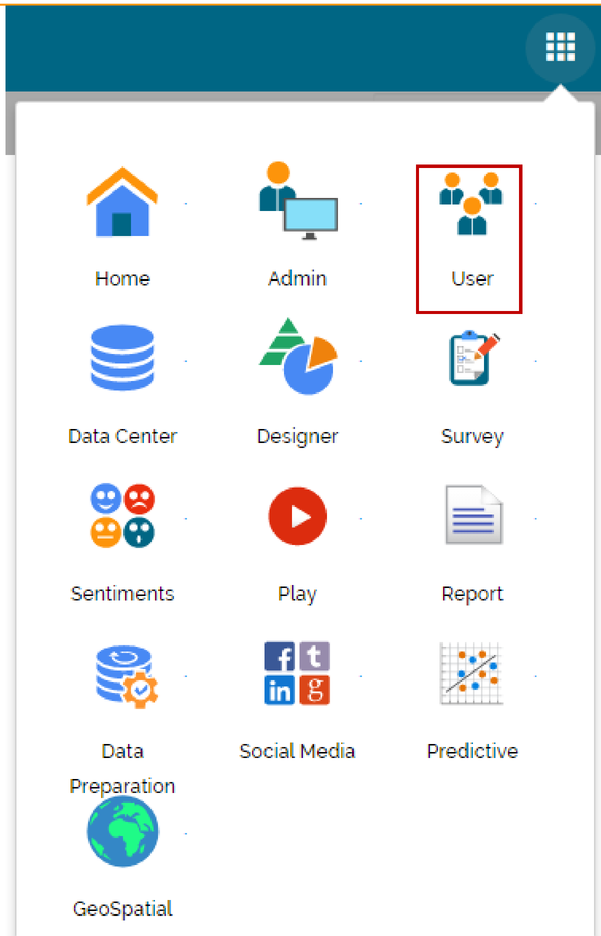


6. User Management

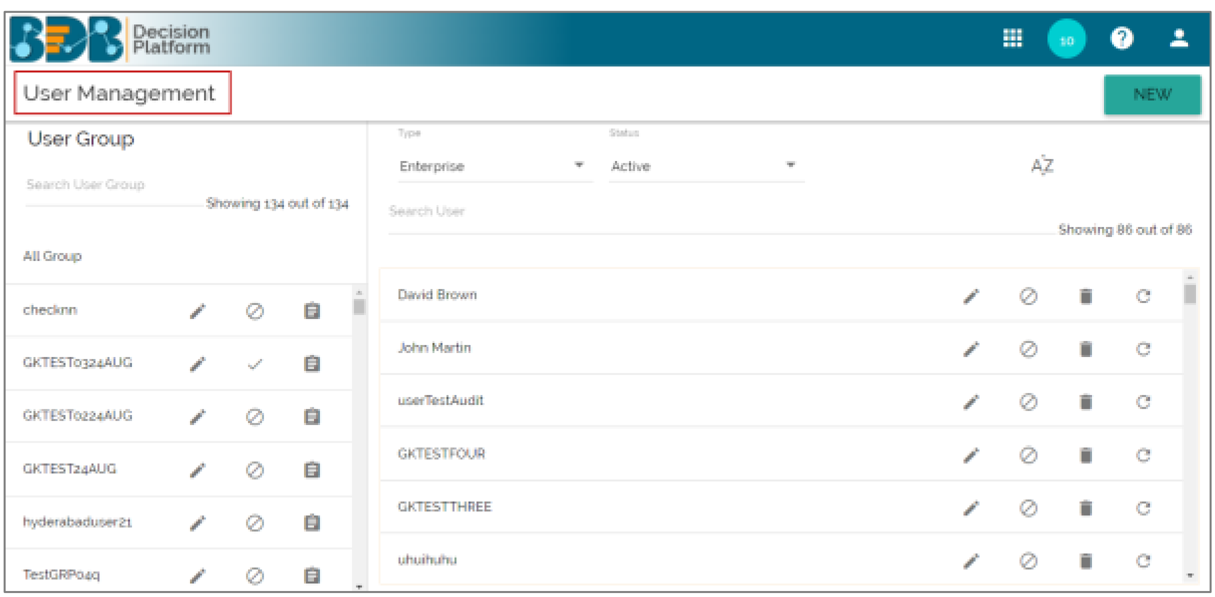
This section describes on how to create a user or user group in BDB Platform. A newly created user must be added to a user group to access the various platform application.

6.1. Accessing the User Management Page

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



ii) Users will be redirected to the User Management page.



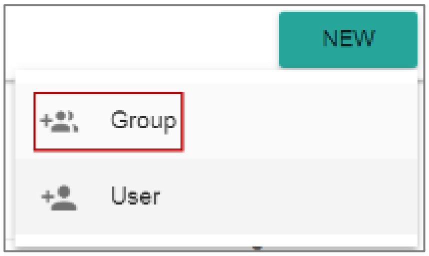
Note: The admin can search for a specific user or group by using the '**Search**' boxes.

6.2. Creating a New User Group

i) Click the ‘**NEW**’.

ii) A context menu opens.

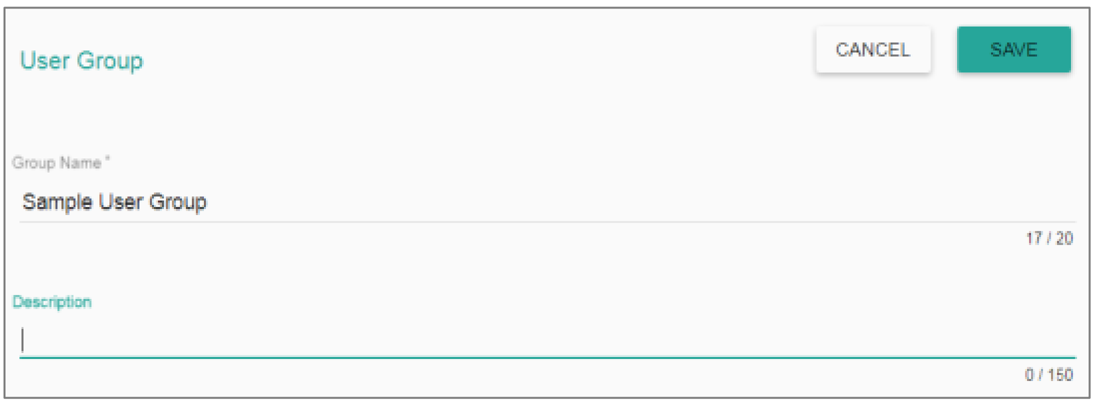
iii) Select ‘**Group**’ option from the context menu.



iv) Provide the following information for a new User Group:

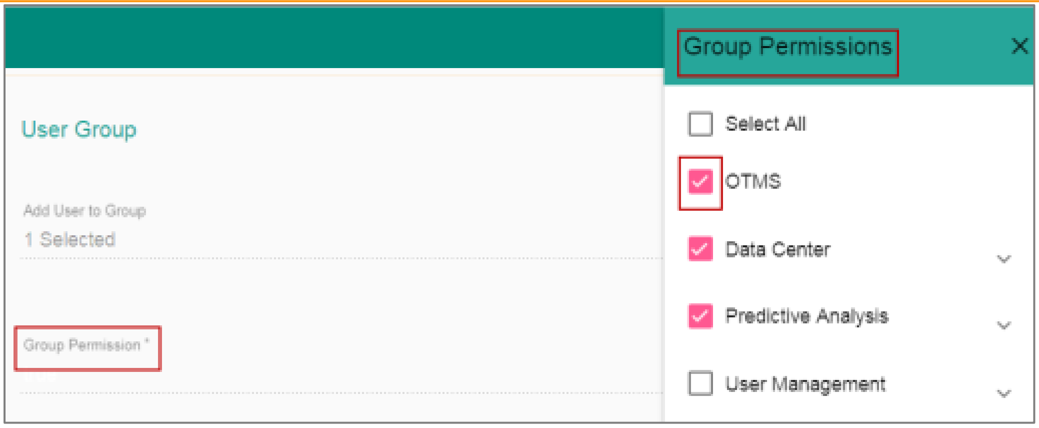
a. **Group Name:** Enter a name for the user group (Maximum provided word limit is 20 words)

b. **Description:** Describe the user group (optional) (Maximum provided word limit is 150 word)

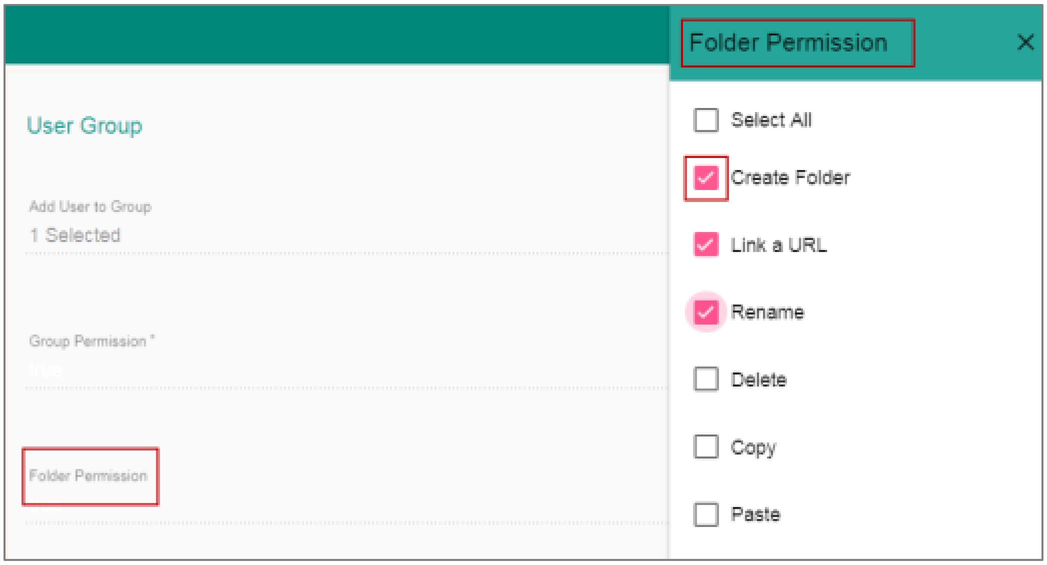


c. **Add User to Group**: Click the ‘**Add**’ button and select User(s) by check marking in the box from the pop-up window.

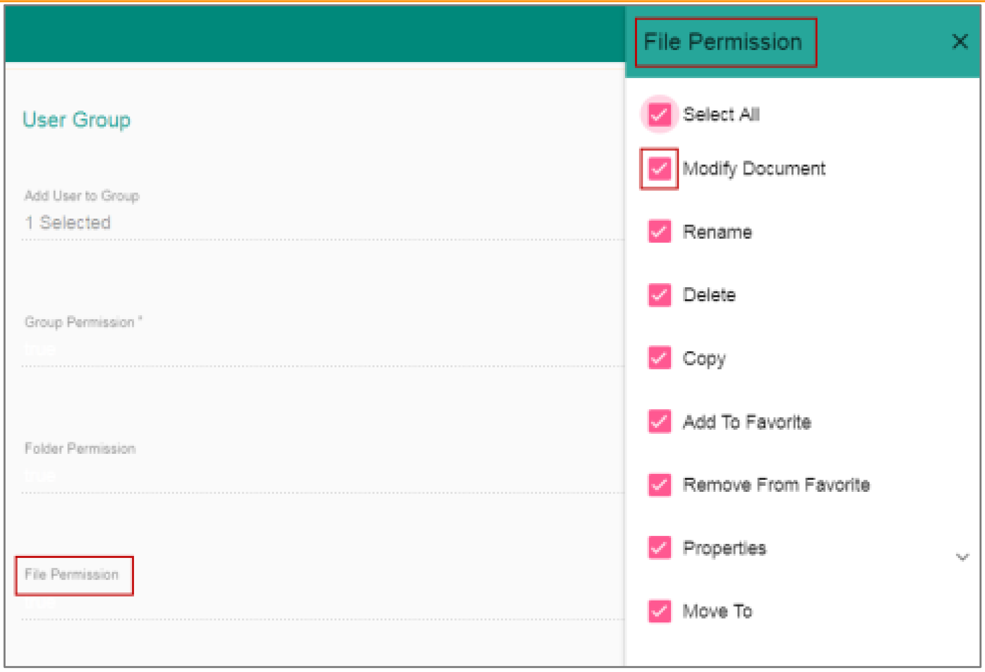
d. **Group Permission**: Click the ‘**Add**’ button provided next to the Group Permissions option. Assign various plugin/app rights to the User Group via the ‘**Group Permissions**’ pop-up window (It is Mandatory).



e. **Folder Permissions**: Click the ‘**Add**’ button provided next to the Folder Permission option. Assign various folder permissions to the User Group via the ‘**Folder Permission**’ pop-up window.

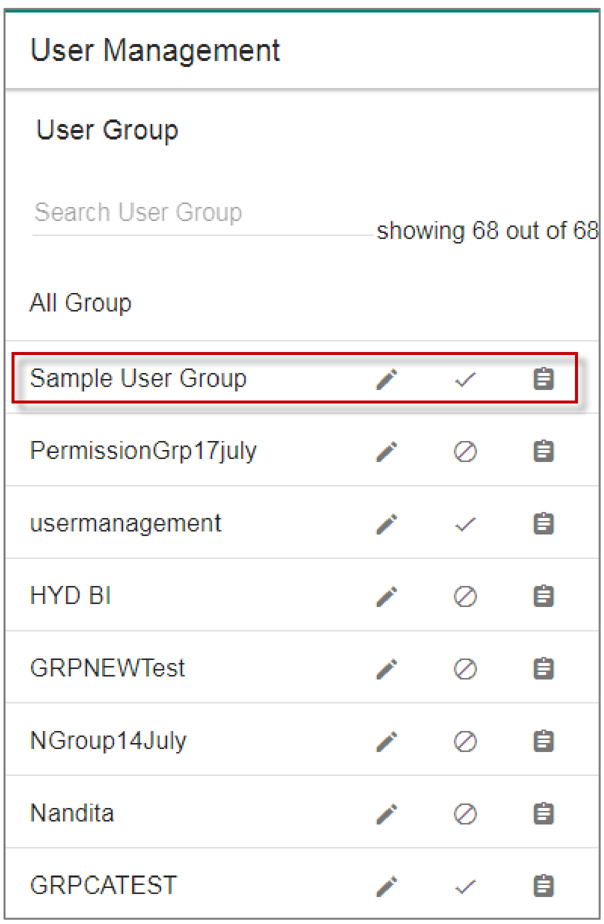


f. **File Permissions**: Click the ‘**Add**’ button provided next to the File Permission option. Assign various file permissions to the User Group via the ‘**File Permission**’ pop-up window.



v) Click **'Save'**

vi) The newly created group will be listed under the User Group list (as shown below):

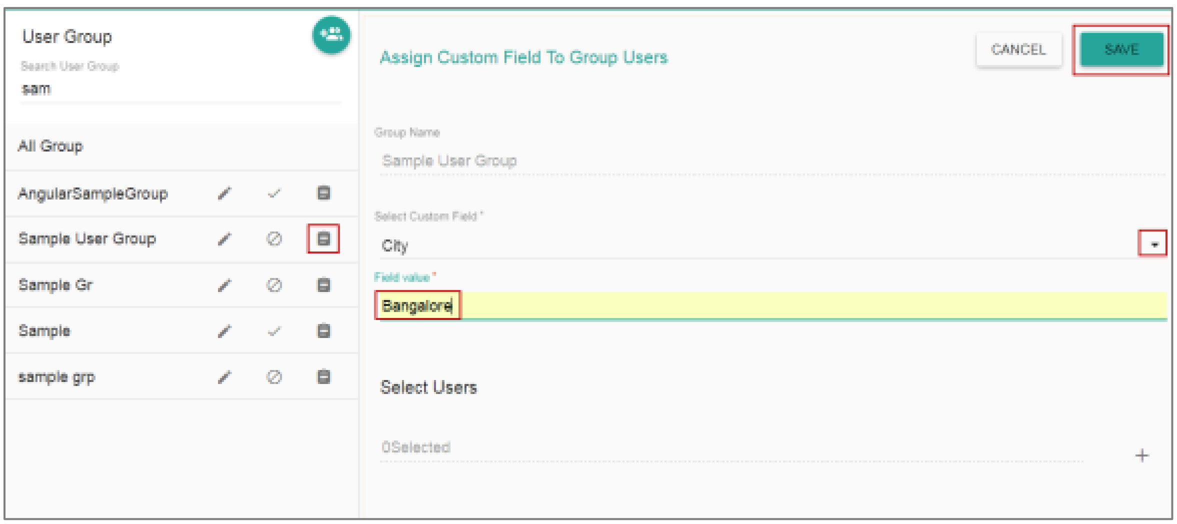


Option	Name	Description
	Edit	To edit details for the selected user group
	Activate Group	To activate the selected user group
	Block Group	To block the selected user group
	Assign Custom Fields	To assign the group-specific custom fields.

6.2.1. Assigning Group Custom Fields

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

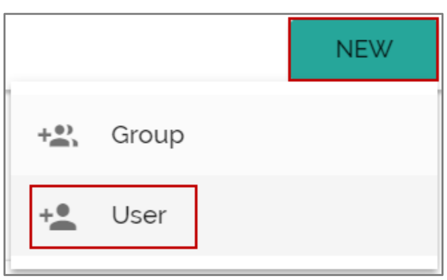
i) Select a user group from the User Group list.
ii) Click ‘**Assign Custom Field**’ option provided next to the user group.
iii) The ‘**Assign Custom Field to Group Users**’ page will be displayed.
iv) Select a Custom Field using the drop-down menu.
v) A new field will be displayed to assign the ‘**Field Value**’ for the selected custom field.
vi) Click ‘**Save**’



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

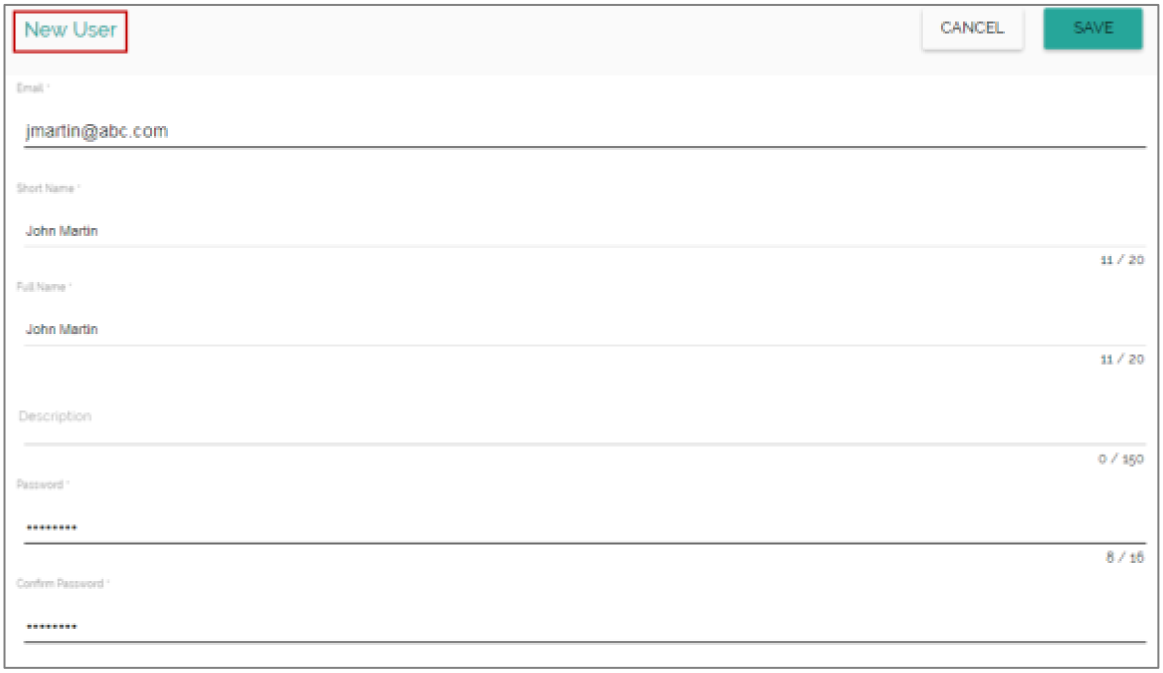
6.3. Creating a New User

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

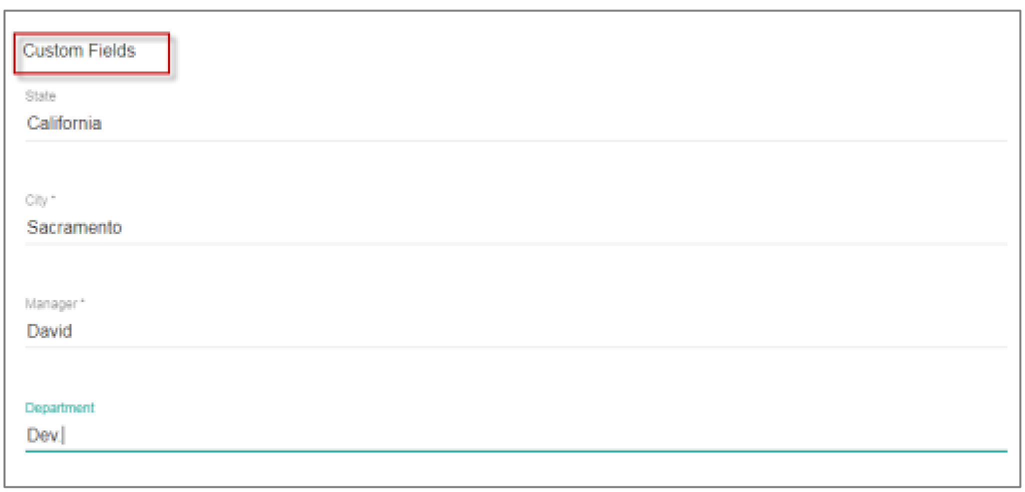


iv) Users will be directed to the ‘**New User**’ form.
v) Fill in the following information to create a new User:

a. **Email:** Email address
b. **Short Name:** Short name of the user
c. **Full Name:** Full name of the User
d. **Description:** Describe about the user (optional)
e. **Password:** Password to be assigned to the new user
f. **Confirm Password:** Confirm the above password

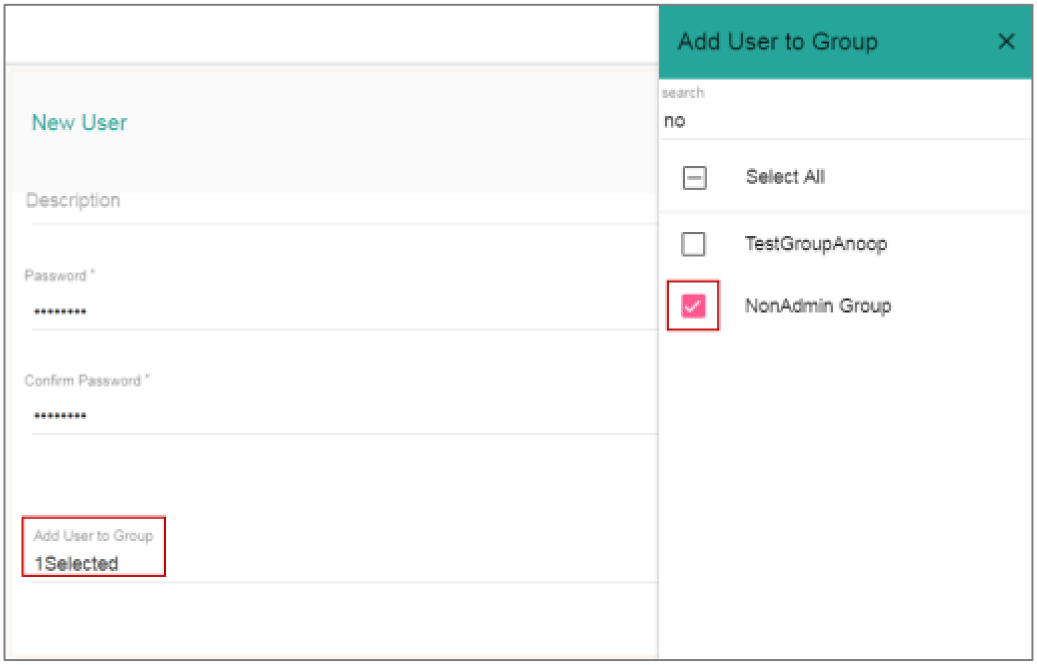


vi) Preconfigured custom fields will be displayed in this form. Users need to provide the required details using the custom fields, if marked as mandatory (The user will get group specific custom fields).

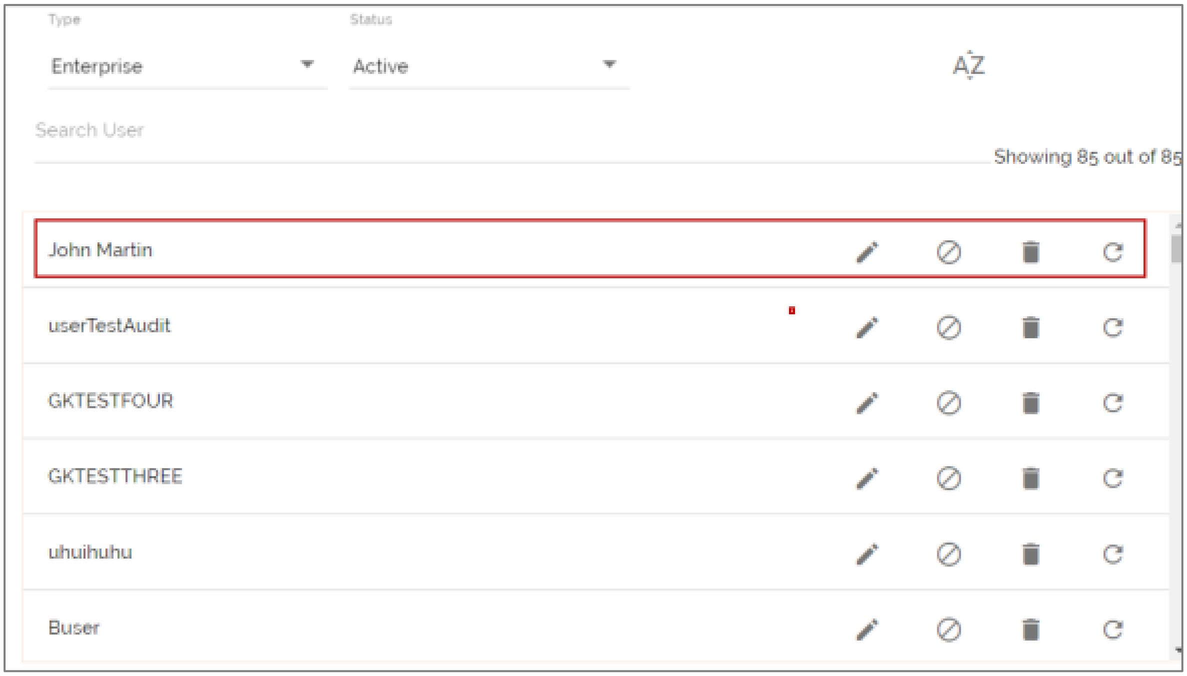


vii) Click the '**Add**' option provided next to the '**Add User to Group**' field.

viii) A new window will open with the existing user groups list.
ix) Select the user groups from the window to add the new user.
x) Click '**Save**'.



xi) Users will be directed to the existing user list.
xii) The newly created user will be added in the user list.



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

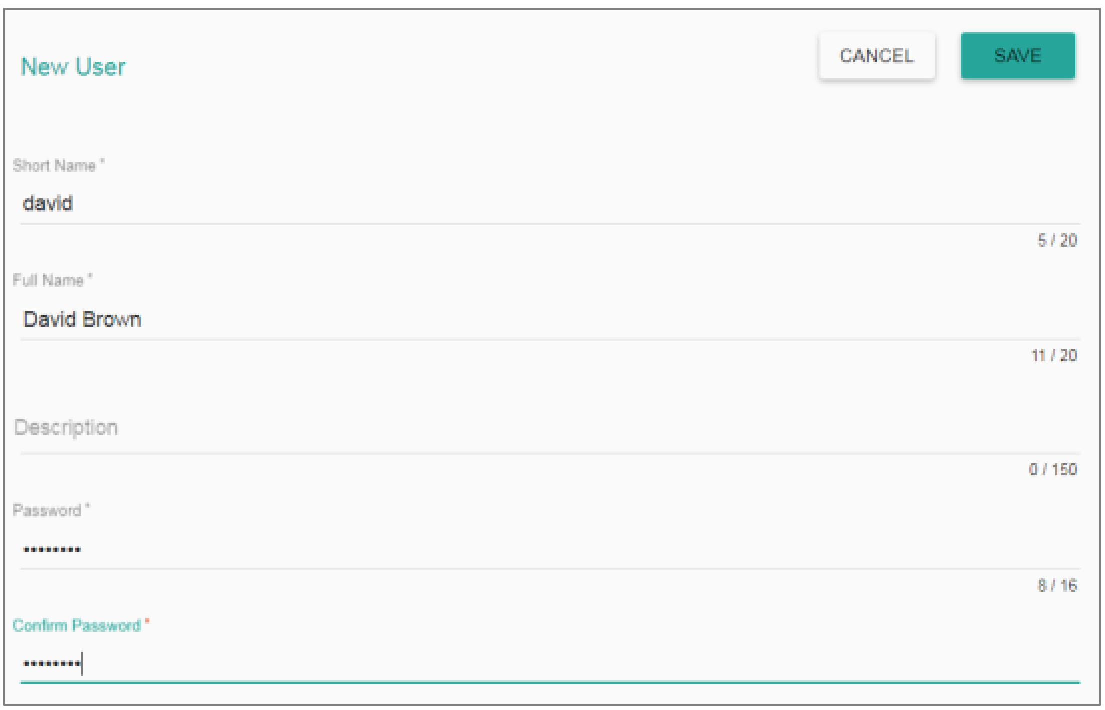
Note:

a. All the user specific details other than email id can be updated/edited by using the Update User page.
b. If the new user is added in the Admin Group, the new user becomes admin.
c. A user can be added to the multiple groups.

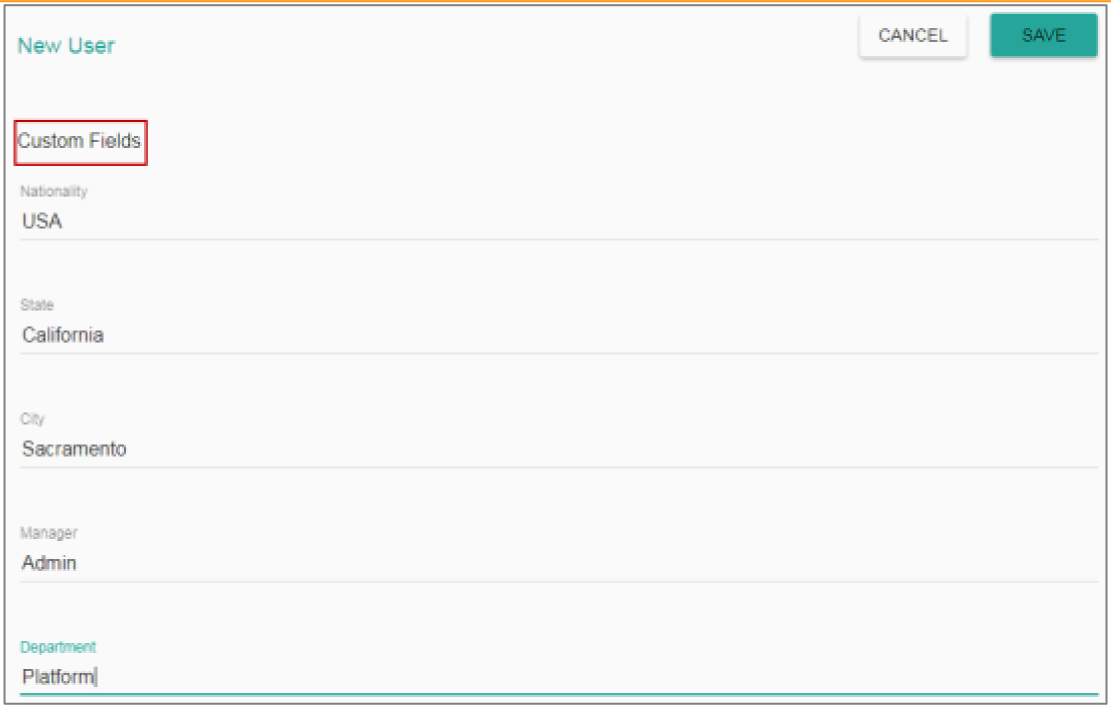
6.3.1. Default User Role

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

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

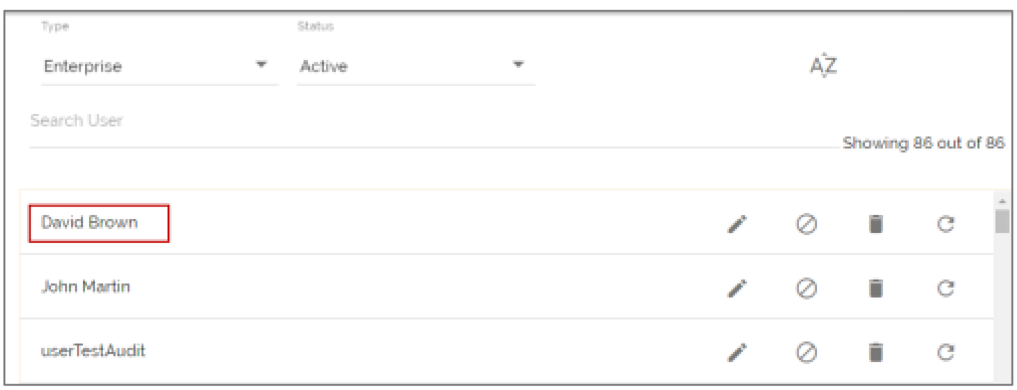


iv) Provide the ‘**Custom Fields**’ details for the new user (If marked as mandatory).

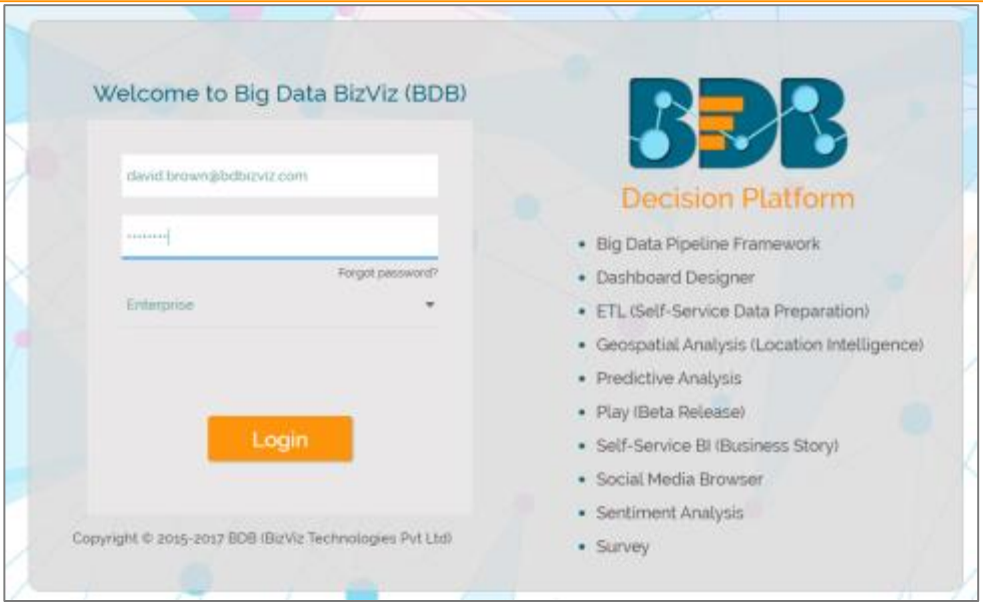


v) Do not add the user to any group.

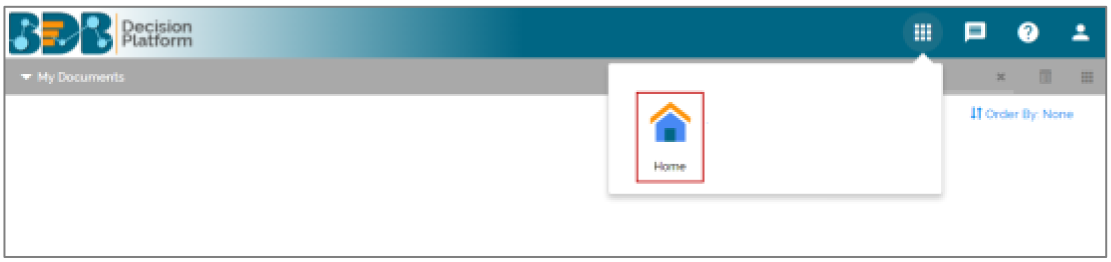
vi) The user will be created and added to the list of users.



vii) Login to the platform through the new user's credentials.



viii) The new user can access the platform home page, but not the platform plugins.



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

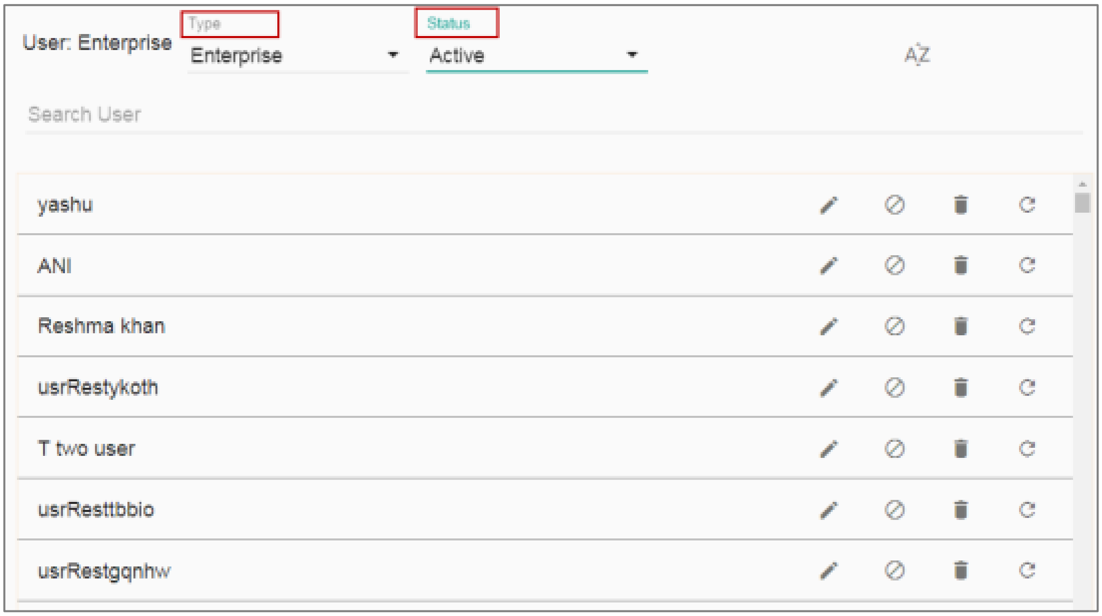
1. **Viewer Role**: Any user created under the BizViz Platform will be assigned this role by default.
2. **Admin Role**: If a user created under the Default User Role is added in the Admin Group, the user will get the Admin Role.
3. **Ordinary User Role**: If the users created under the Default User Role is added in any group other than Admin Group, the user will be assigned the group-specific permissions.

6.4. User Status

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

i) Navigate to the User Management page.
ii) Users will be directed to the two drop-down menus.
   a. **Type**: It contains the following authentication types as drop-down options.
      i. Enterprise
      ii. Window AD
      iii. CA PPM
   b. **Status**: It contains the following user status as drop-down options.
      i. Active
      ii. Blocked

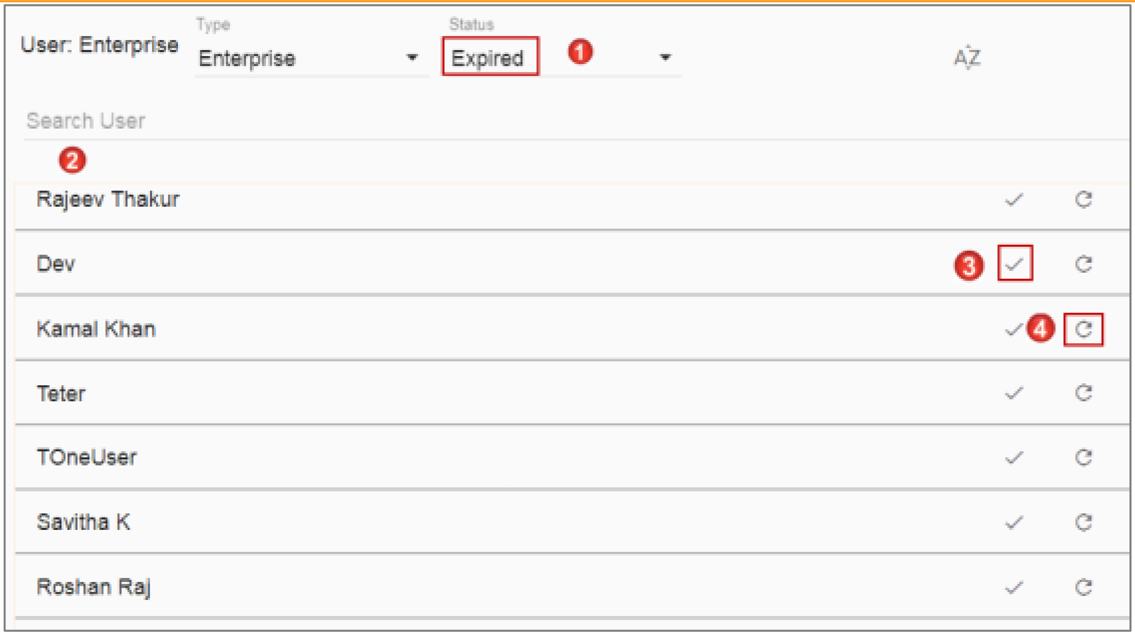
iii. Expired
iv. Deleted



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

6.4.1. Activating an Expired User Account

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



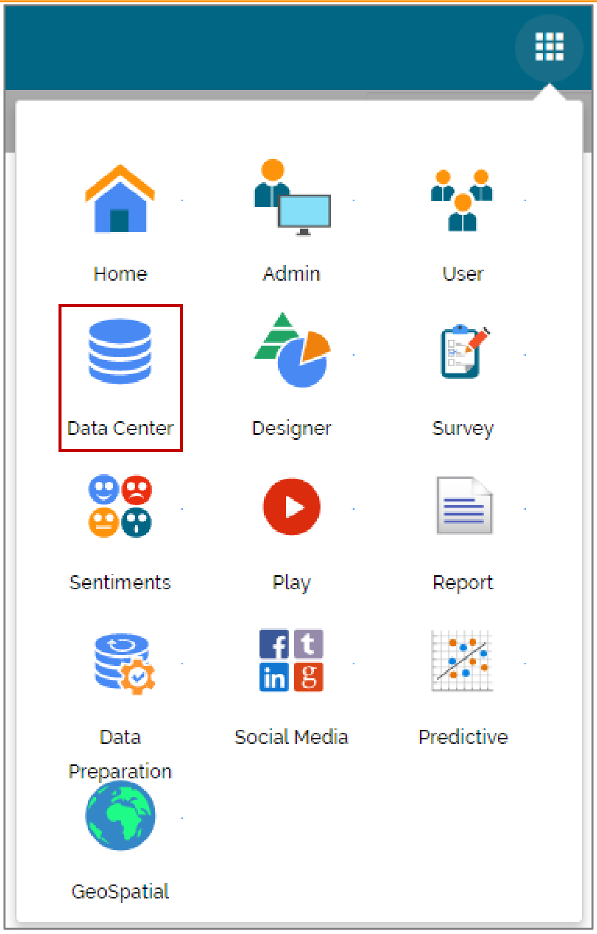
Note: By clicking '**Activate**', an expired user account can be activated. The user can use the old password. However, when the '**Reset Password**' option has been used, the user will be activated with a new password (In this case, the user will be redirected to set a new password).

7. Data Center

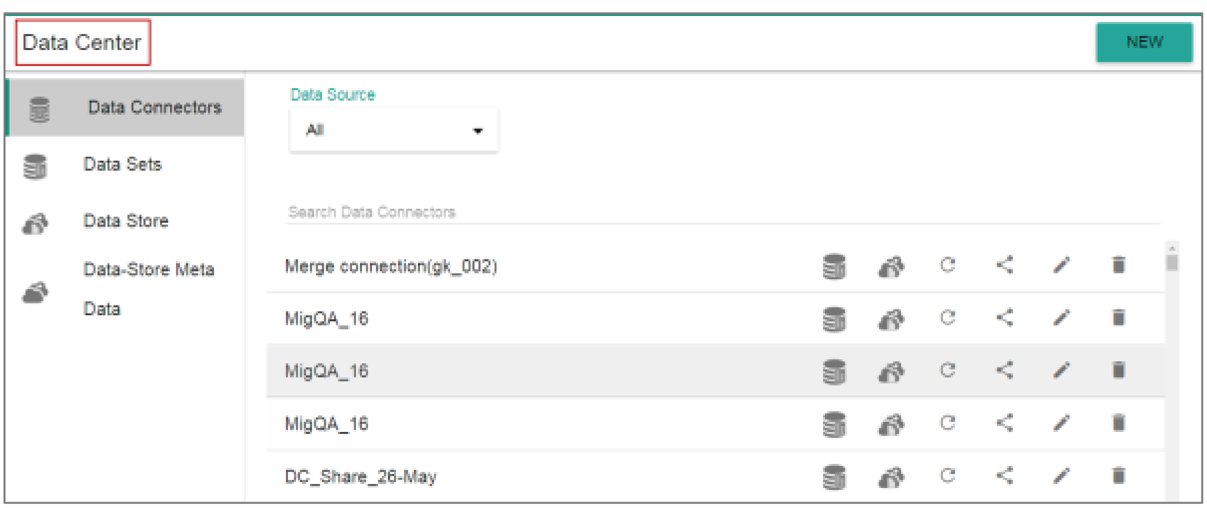
This section explains how to connect with multiple databases to create data service and in-memory data store.

7.1. Creating a Data Connector

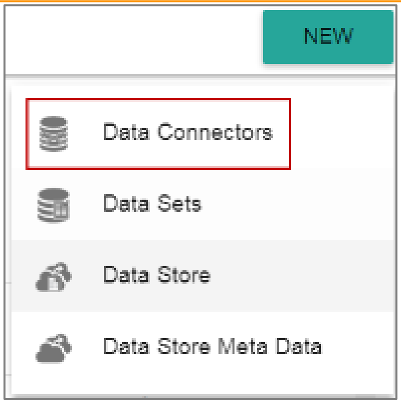
i) Click the '**Data Center**' option from the apps menu.



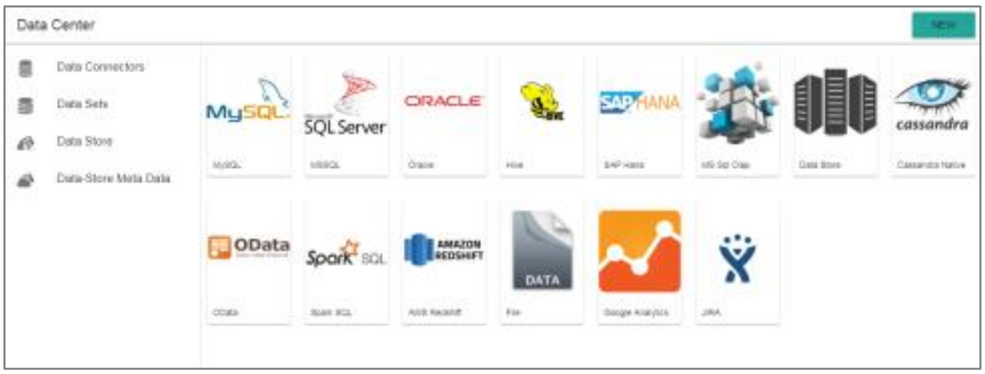
ii) Users will be directed to the Data Center page.
iii) Select a Data Source using the '**Data Source**' filter.
iv) Click '**NEW**'



v) A context menu opens.
vi) Select '**Data Connectors**' from the context menu.

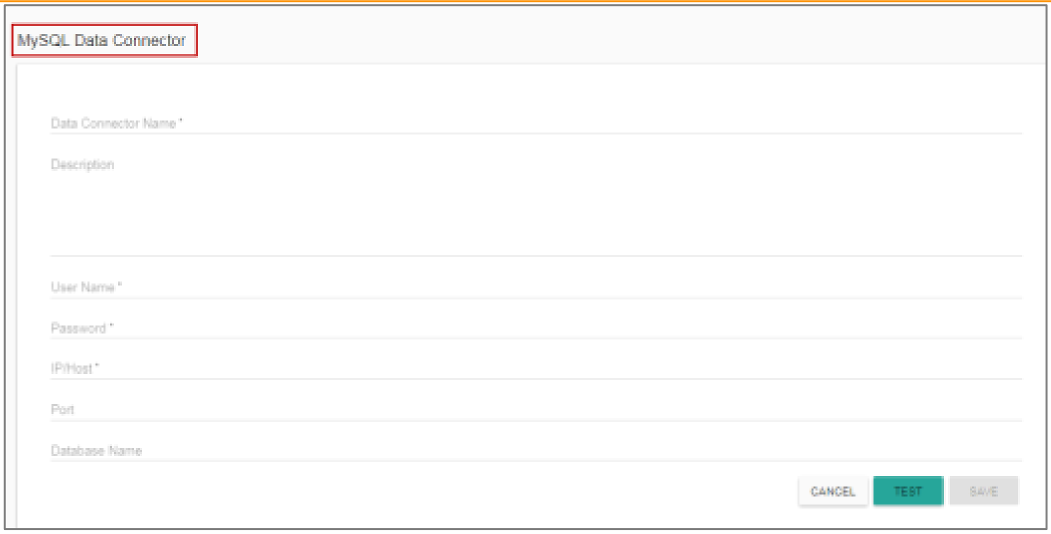


vii) Users will be redirected to the below-given page.
viii) Select a connector type.



ix) Users will be directed to the configuration page for the selected data connector.
x) *Fill the required information for a new Data Connector: Refer '**Required Fields for the Available Data Connectors**' segment for the connector specific details.
xi) Click '**Test**' to verify the connection.
xii) A pop-up message will appear to confirm the connection.
xiii) Click '**Save**'.

Following is a sample image of the Data Connector Form displaying required fields to create a new Data Connector:



***Required Fields for the Available Data Connectors**

1. **MySQL**

i) **Data Connector Name:** A user defined name to identify the data source
ii) **Description:** Connection Details
iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
iv) **Password:** Enter the Password (It should be the same as given in the connection server)
v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)
vi) **Port:** The server port number
vii) **Database Name:** Name of the database where data will be stored

2. **MSSQL**

i) **Data Connector Name:** A user defined name to identify the data source
ii) **Description:** Connection Details
iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
iv) **Password:** Enter the Password (It should be the same as given in the connection server)
v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)
vi) **Port:** The server port number
vii) **Database Name:** Name of the database where data will be stored

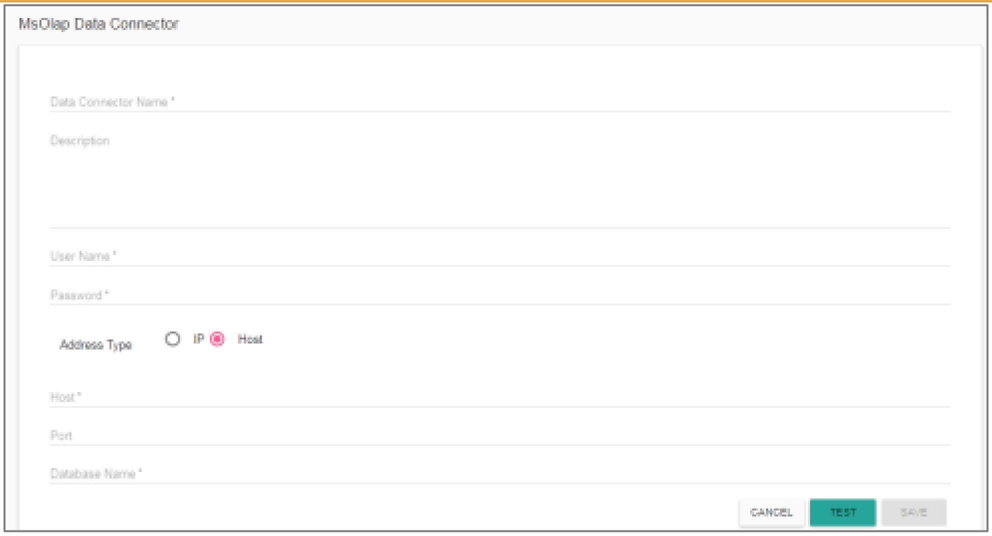
3. **Oracle**

i) **Data Connector Name:** A user defined name to identify the data source
ii) **Description:** Connection Details
iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
iv) **Password:** Enter the Password (It should be the same as given in the connection server)
v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)
vi) **Port:** The server port number
vii) **SID Service Name:** Unique alias used for the database (when connecting)

4. **Hive**
    i) **Data Connector Name**: A user defined name to identify the data source
    ii) **Description**: Connection Details
    iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
    iv) **Password:** Enter the Password (It should be the same as given in the connection server)
    v) **IP/HOST**: Enter database server details (from where the user wants to fetch data)
    vi) **Port:** The server port number

5. **SAP Hana**
    i) **Data Connector Name**: A user defined name to identify the data source
    ii) **Description**: Connection Details
    iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
    iv) **Password:** Enter the Password (It should be the same as given in the connection server)
    v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)
    vi) **Port:** The server port number

6. **MSSQL Olap**
    i) **Data Connector Name:** A user defined name to identify the data source
    ii) **Description:** Connection Details
    iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
    iv) **Password:** Enter the Password (It should be the same as given in the connection server)
    v) **Address Type (IP/Host):** As per the selected Address Type a field will be displayed below. Users need to enter database server details (from where the user wants to fetch data).
    vi) **Port:** The server port number
    vii) **Database Name:** Name of the database where data will be stored



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

8. **Cassandra Native Data Connector**
   i) **Data Connector Name:** A user defined name to identify the data source
   ii) **Description:** Connection Details
   iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
   iv) **Password:** Enter the Password (It should be the same as given in the connection server)
   v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)
   vi) **Port:** The server port number
   vii) **Default Key-Space Name:** Enter the default keyspace name
   viii) **Consistency:** Select a consistency option from the drop-down list (One/Two/Three/Quorum)

9. **O Data**
   ii) **Data Connector Name:** A user defined name to identify the data source
   iii) **Description:** Connection Details
   iv) **Database Type:** Database type using the drop-down menu in which the data will be stored (OData V1-V2/OData V3-V4)
   v) **User Name:** Enter a User Name (It should be the same as given in the connection server)
   vi) **Password:** Enter the Password (It should be the same as given in the connection server)
   vii) **Base Url:** Enter Service Root URL or Base URL

10. **Spark SQL**
    i) **Data Connector Name:** A user defined name to identify the data source
    ii) **Description:** Connection Details
    iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
    iv) **Password:** Enter the password (It should be the same as given in the connection server)
    v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)

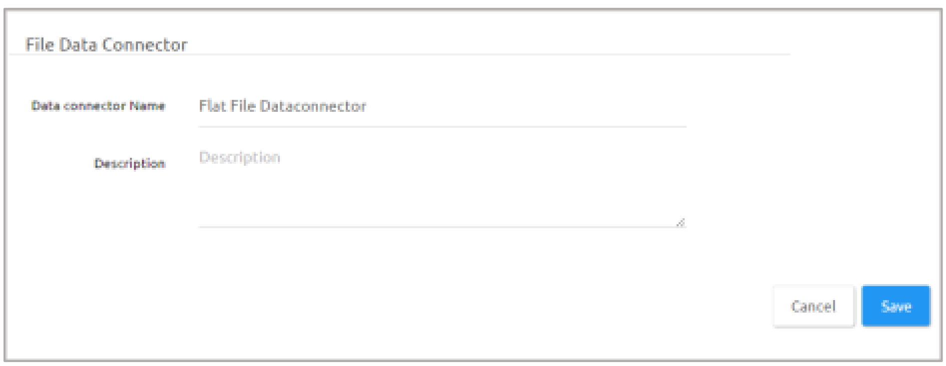
vi) **Port:** The server port number

11. AWS Redshift

i) **Data Connector Name:** A user defined name to identify the data source
ii) **Description:** Connection Details
iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
iv) **Password:** Enter the password (It should be the same as given in the connection server)
v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)
vi) **Port:** The server port number
vii) **Database Name:** Name of the database where data will be stored

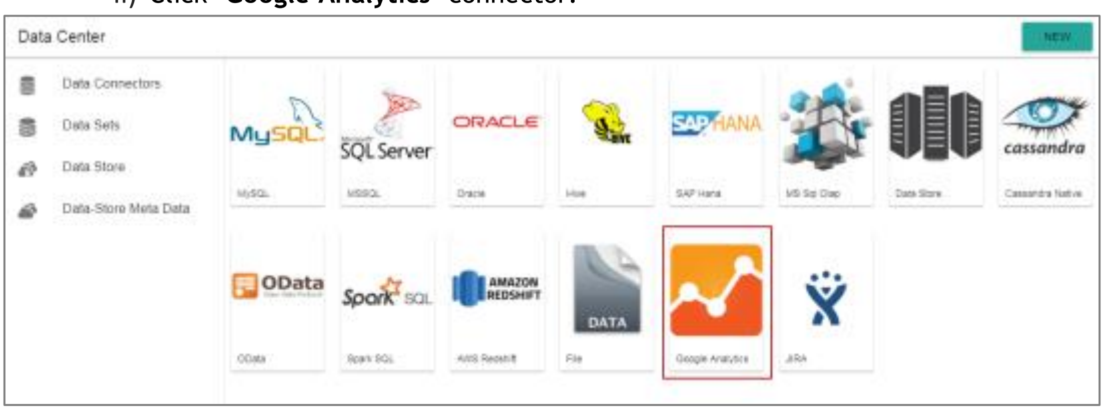
12. File

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

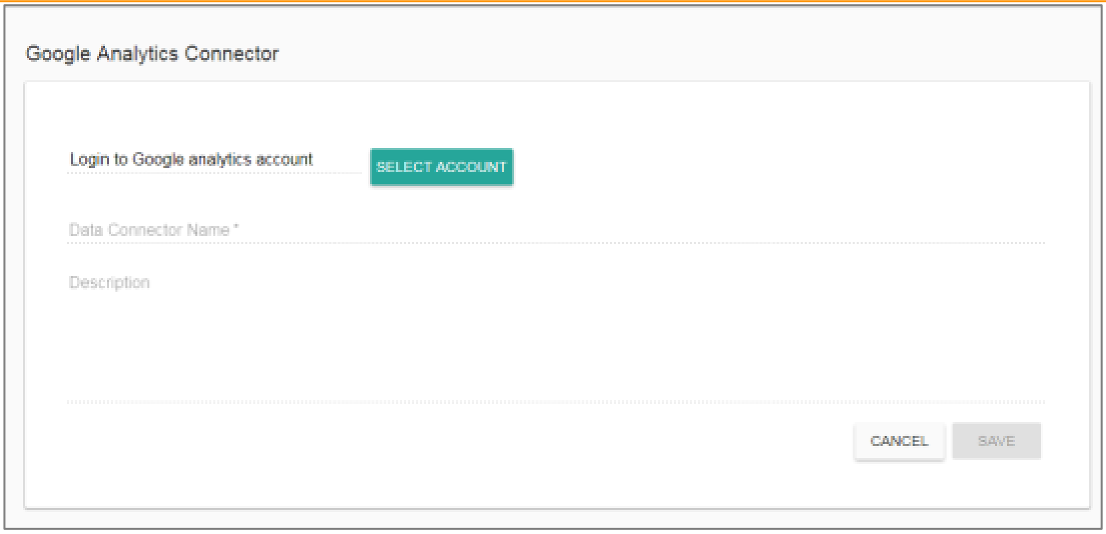


13. Google Analytics

i) Navigate to the Data Connector page.
ii) Click '**Google Analytics**' connector.

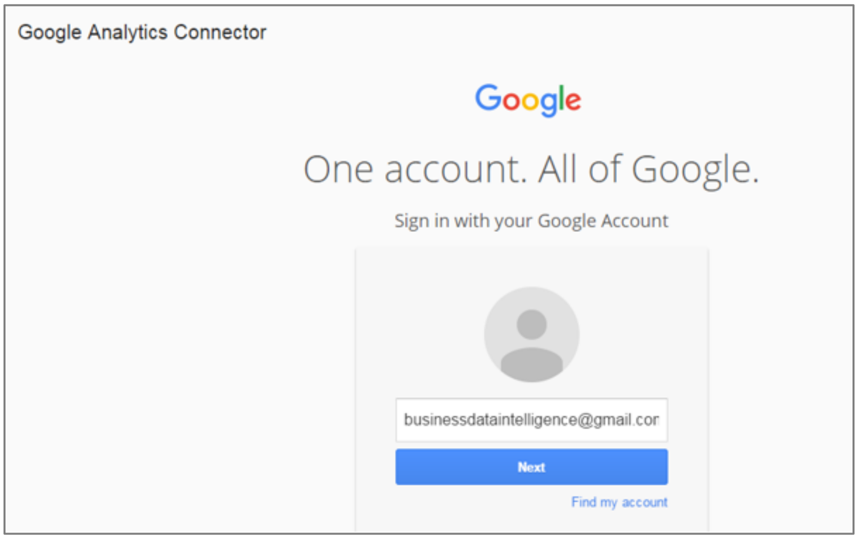


iii) Users will be directed to the Google Analytics Connector form.

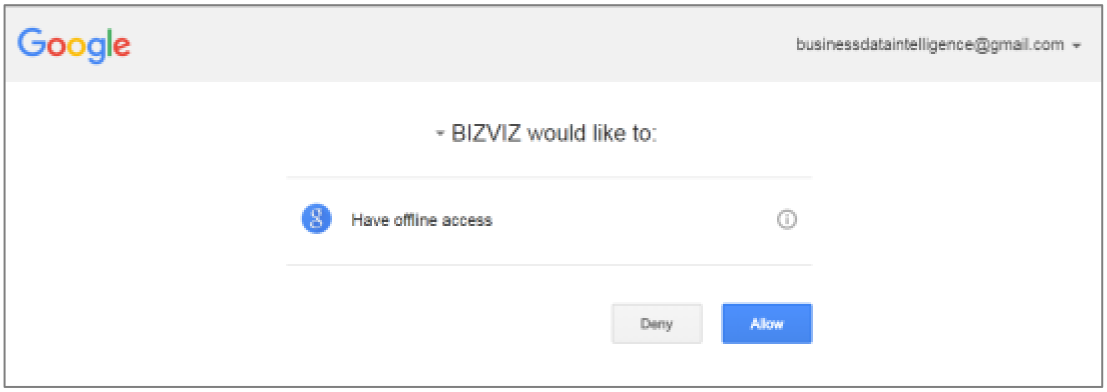


iv) Select Account: Select a Google account.

a. After selecting an account user need to login to the account.



b. Give access of the analytics data.

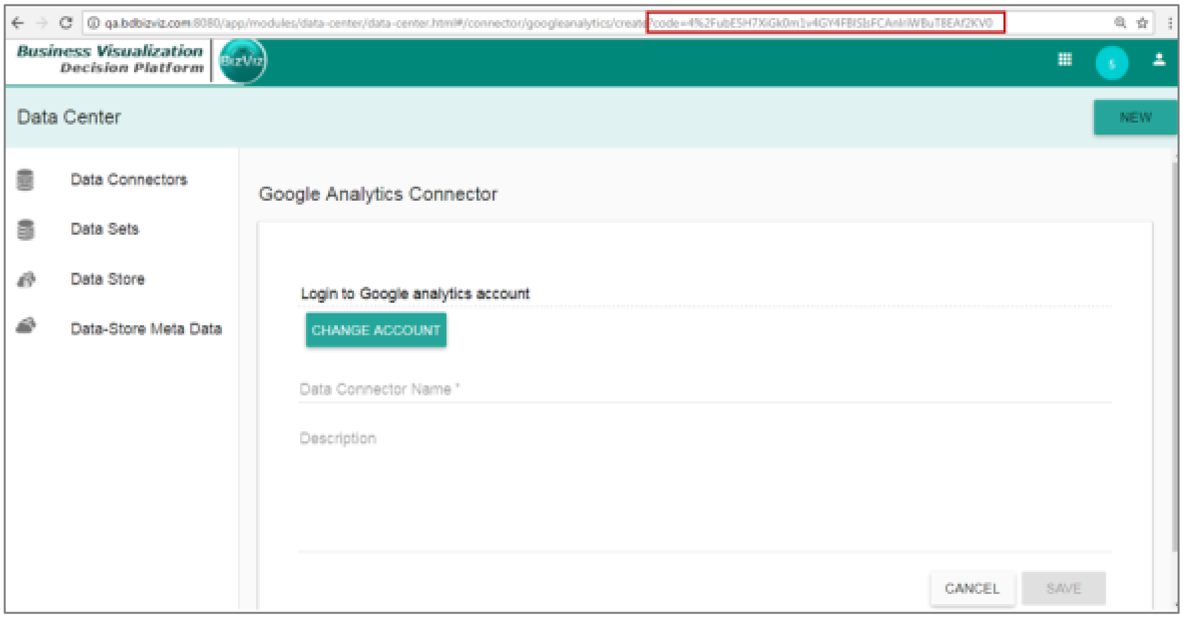


c. After getting the access permission, users will be redirected to the data connector form with an authorization code in the URL.

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

vi) **Description:** Connection details (optional)

vii) Click **'Save'.**



viii) The new Google Analytics Data Connector will be created and added to the existing list of data connectors.

14. JIRA

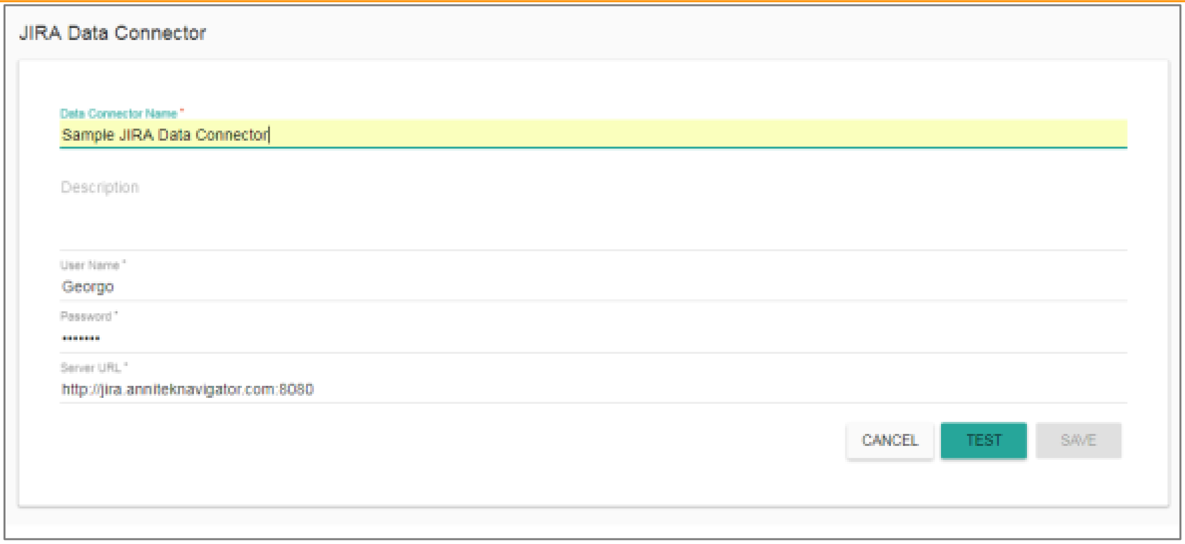
i) **Data Connector Name:** A user defined name to identify the data source

ii) **Description:** Connection Details

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

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

v) **Server URL:** Enter the server URL details.



vi) Click ‘**TEST**’ to verify the connection.

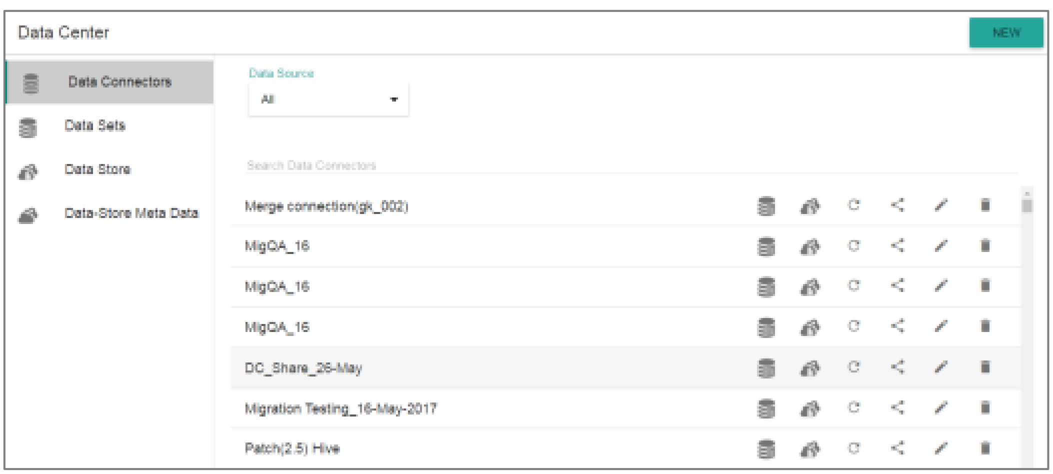
vii) Click ‘**SAVE**’.

viii) The new JIRA Data Connection will be saved and added in the list of Data Connectors.

7.2. Data Connector List

All the created data connectors will be listed on the Data Center page.

- The list appears by default while selecting the ‘**Data Center**’ option from the apps list.
- Users can also get the list of data connectors by clicking on the ‘**Data Connectors**’ option provided at the top left side of the page.

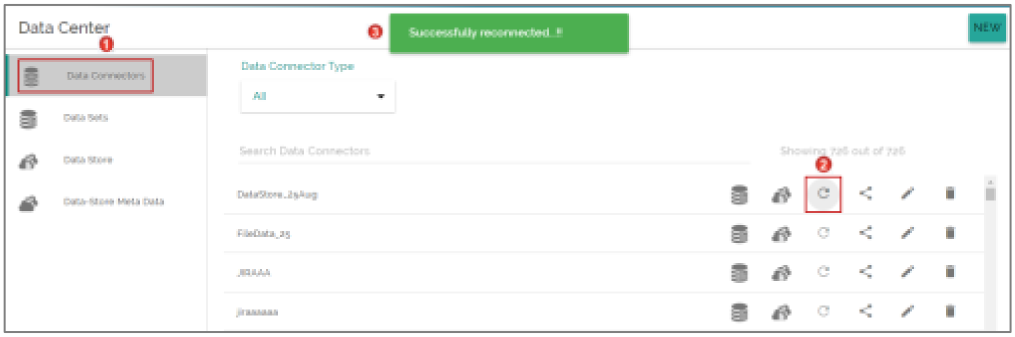


Option	Name	Task
	New Data Set	Redirect user to create a new data set
	New Data Store	Redirect user to create a new data store
	Reconnect	Reconnect with the server
	Share	Share connector with the selected user(s) or group(s)
	Edit	Edit the connector fields

	Remove	Remove a connector from the list

7.2.1. Reconnecting a Data Connector

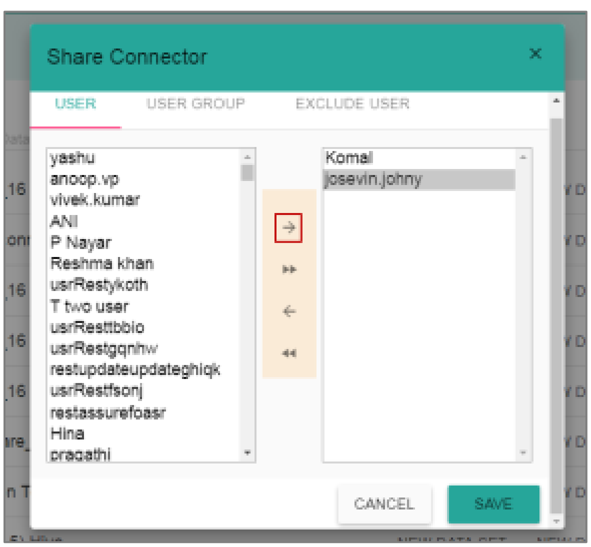
i) Navigate to the Data Connector list.
ii) Select a Data Connector and click the ‘**Reconnect**’ icon
iii) A message will pop-up to assure the action.



iv) The selected data connector will be reconnected.

7.2.2. Sharing a Data Connector

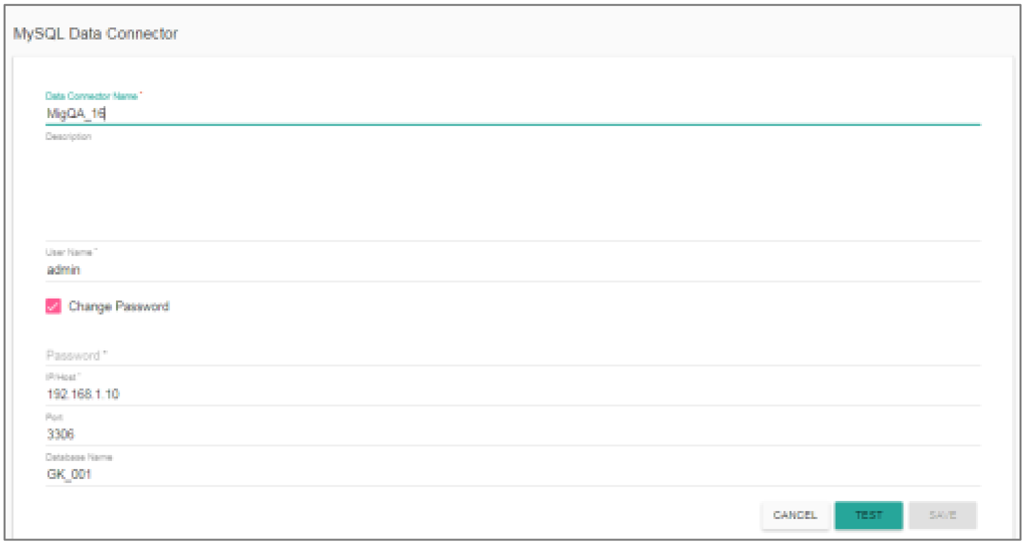
i) Navigate to the Data Connector list.
ii) Select a Data Connector and click the ‘**Share**’ icon
iii) Users will be directed to a new page.
iv) Select an option (User/User Group/Exclude User) and move user(s)/user group(s) to the box given on the right.
v) Click ‘**Save**’.



vi) The selected data connector will be shared with the selected user(s)/user group(s) or the selected user will be excluded from the same.

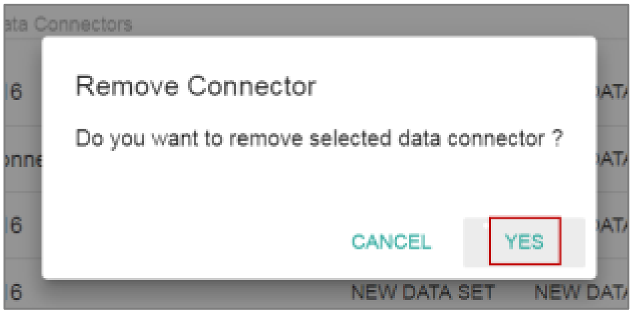
7.2.3. Editing a Data Connector

i) Navigate to the Data Connector list.
ii) Select a Data Connector and click the '**Edit**' icon
iii) Users will be directed to a new page.
iv) Edit or modify the required details.
v) Click '**TEST**' to verify the connector.
vi) Click '**Save**' to save the edited details.



7.2.4. Removing a Data Connector

i) Navigate to the Data Connector list.
ii) Select a Data Connector and click the '**Remove**' icon
iii) A message will pop-up to confirm the deletion.
iv) Click '**YES**'.

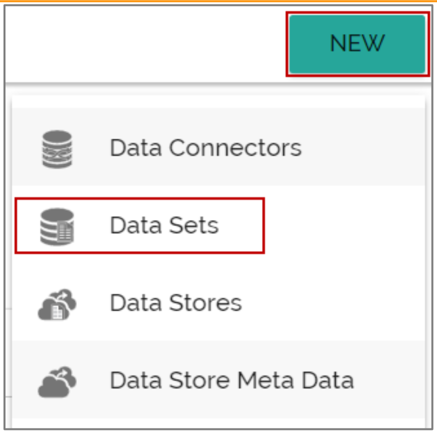


v) The selected data connector will be removed from the list.

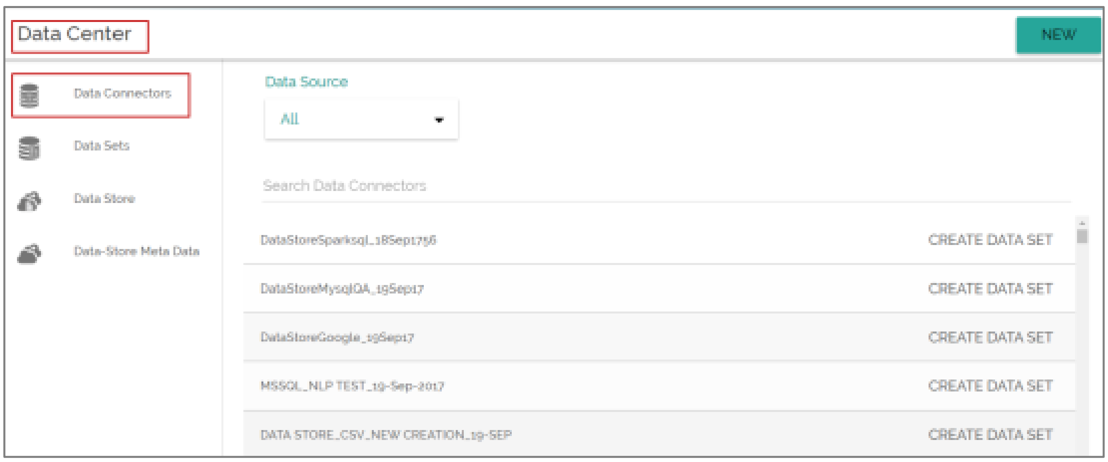
7.3. Creating a New Data Set

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

i) Navigate to the Data Center page.
ii) Click '**NEW**'
iii) A context menu opens
iv) Select '**Data Sets**' from the context menu.



v) Users will be directed to the following page.



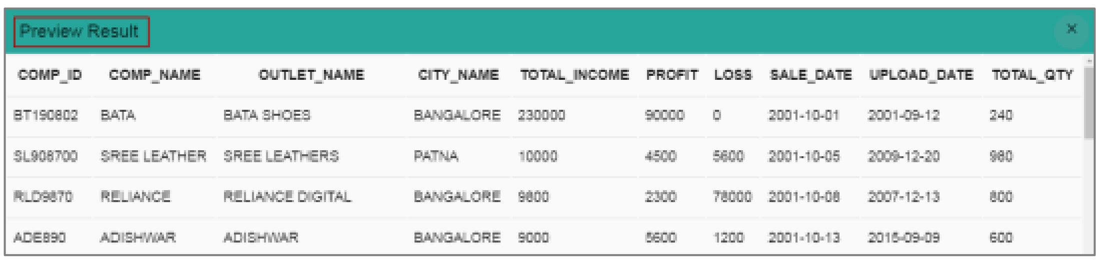
vi) Select a Connector Type from the '**Data Source**' filter.
vii) Select a data connector from the '**Data Connector**' list.
viii) Click the '**CREATE DATA SET**' option provided next to the selected data connector.

ix) Users will be directed to the '**Data Set**' form.
x) Fill in the following details:
   a. **Service Name**: Enter any user defined name for the new data set.

b. **Description**: Brief description about data set (It is an optional field).
c. **Data Connector Name**: This option will be pre-defined.
d. **Data Base Name**: This option will be pre-defined.

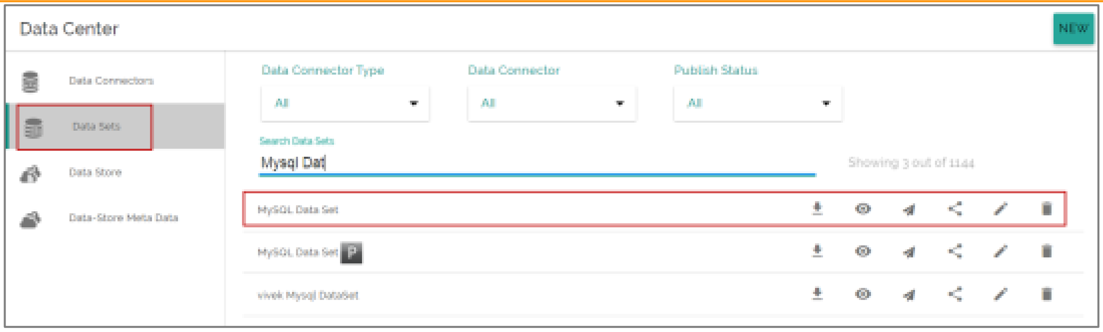
e. **Query**: Write query in the given space (Use '**Ctrl+Space**' for assistance in writing a query).

xi) Click '**Preview**' to display the preview result of the new data set.


Preview Result

COMP_ID	COMP_NAME	OUTLET_NAME	CITY_NAME	TOTAL_INCOME	PROFIT	LOSS	SALE_DATE	UPLOAD_DATE	TOTAL_QTY
BT190802	BATA	BATA SHOES	BANGALORE	230000	90000	0	2001-10-01	2001-09-12	240
SL908700	SREE LEATHER	SREE LEATHERS	PATNA	10000	4500	5600	2001-10-05	2009-12-20	980
RLD9870	RELIANCE	RELIANCE DIGITAL	BANGALORE	9800	2300	78000	2001-10-08	2007-12-13	800
ADE890	ADISHWAR	ADISHWAR	BANGALORE	9000	5600	1200	2001-10-13	2015-09-09	600

xii) Click '**Save**'
xiii) A new data set will be created and added to the list of data sets.

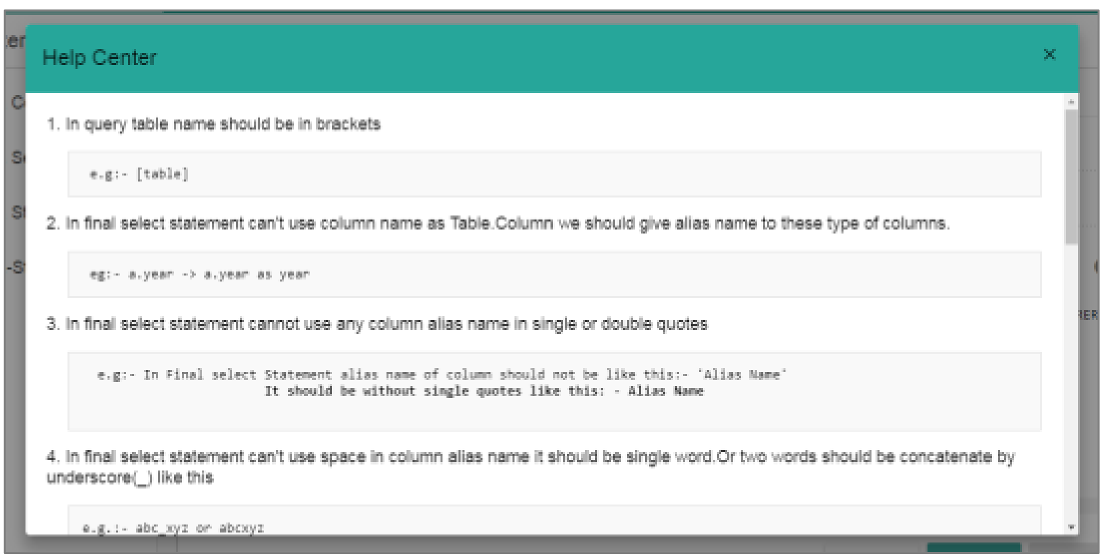


Option	Name	Task
	Download	Download the data set.
	View Link	View the data set link.
	Publish	Publish a data set.
	Share Data Service	Share a data set to/for the selected user(s) or group(s). or Exclude the selected users.
	Edit	Edit the data set fields.
	Remove	Remove the selected data set from the list.

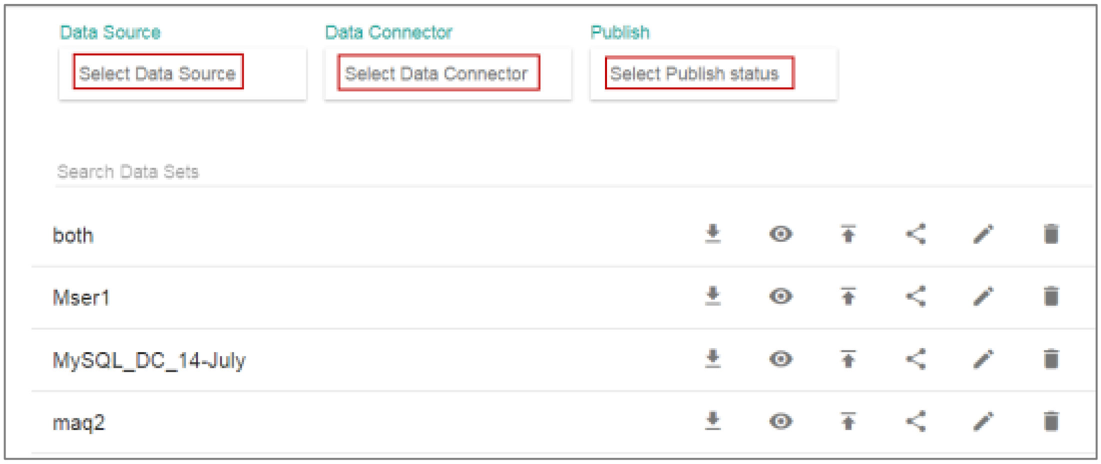
Note:

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

b. Click the ‘**Help**’ icon from the Data Set form to get rules to follow while creating a query. The rules to be followed will be displayed in a pop-up screen.

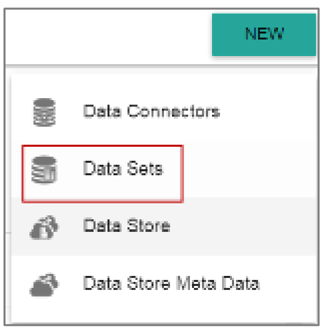


c. Users can filter the data set list by Data Source, Data Connector, and Publish status. These filters are provided on the top of the Data Set List page.

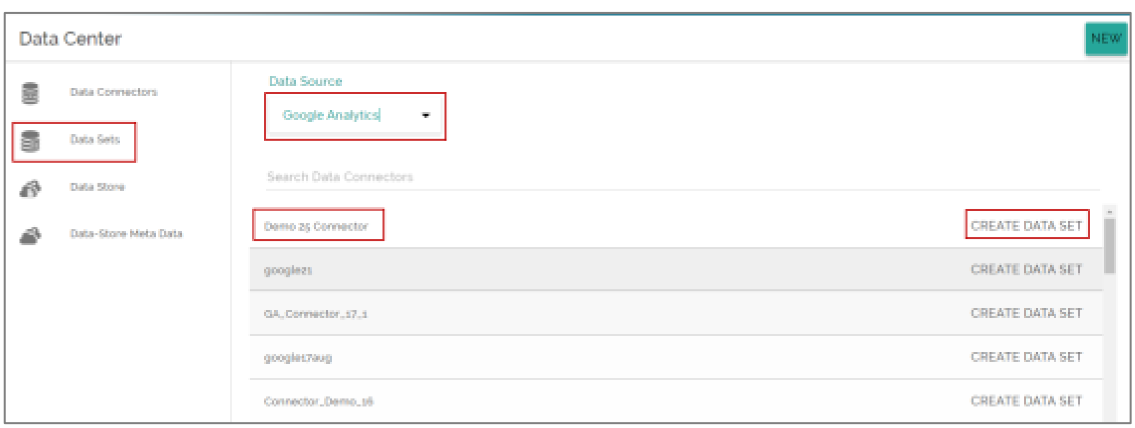


7.3.1. Google Analytics Data Set

i) Navigate to Data Center page.
ii) Click '**NEW**' and select '**Data Set**' from the context menu.



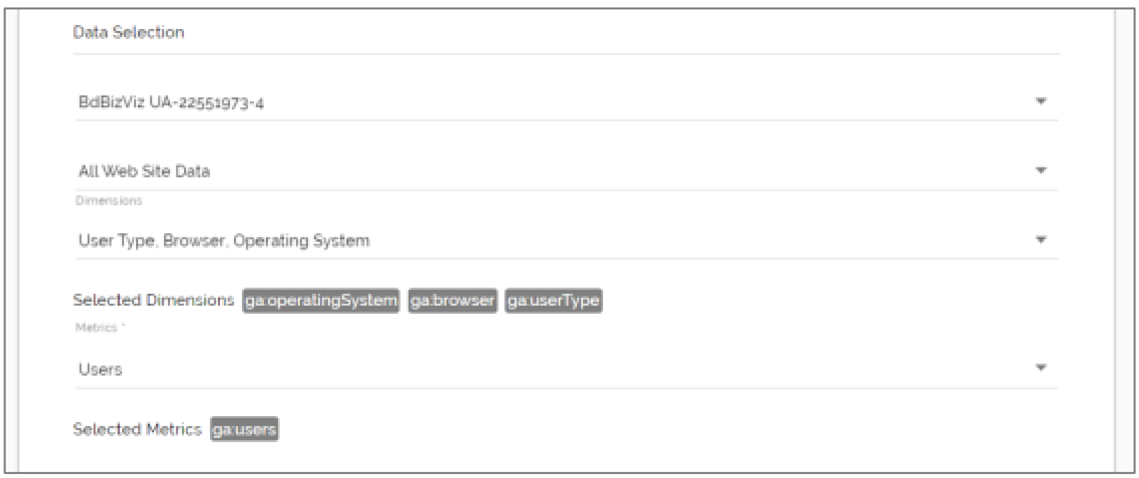
iii) Users will be redirected to the page containing all the data connectors.
iv) Select '**Google Analytics**' via the '**Data Source**' filter.
v) Select a Google Analytics data connector from the displayed list and click '**CREATE DATA SET**'.



vi) Users will be redirected to a new Data Set form for Google Analytics Data Set.
vii) Fill in the following information:
   a. Service Name: Enter any user defined name for the new data set.

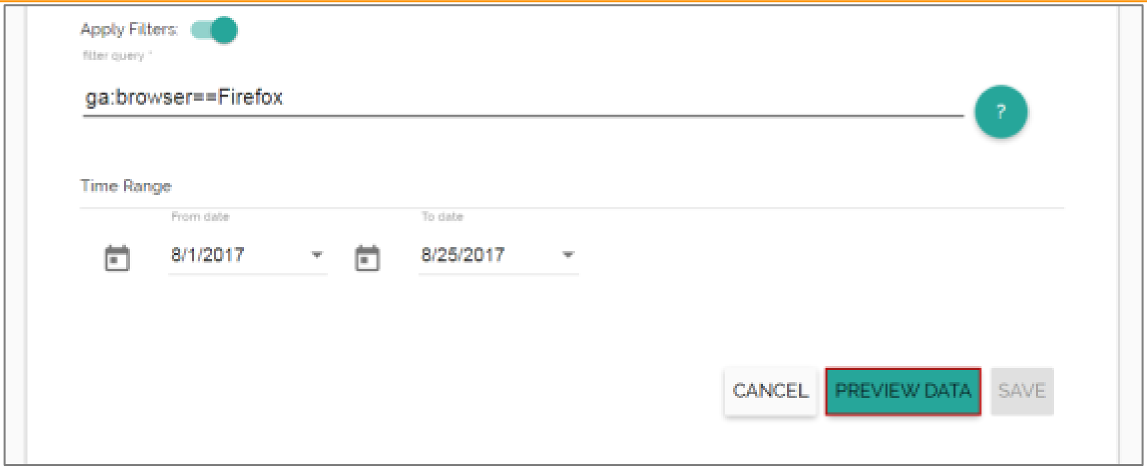
b. Description: Brief description about data set. (It is an optional field).
c. Data Connector Name: This option will be pre-defined.
d. Account: This option will be pre-defined based on the selected google account.

e. Data Selection: Select data using the below given drop-down lists.
   i. Web Properties: Select the required web properties using the drop-down menu.
   ii. Select a View: Select the required view using the drop-down menu.
   iii. Dimensions: Select the required dimensions using the drop-down menu. The selected dimensions will be displayed below with ‘ga’ suffix.
   iv. Metrics: Select the required metrics using the drop-down menu. The selected metrics will be displayed below with ‘ga’ suffix.

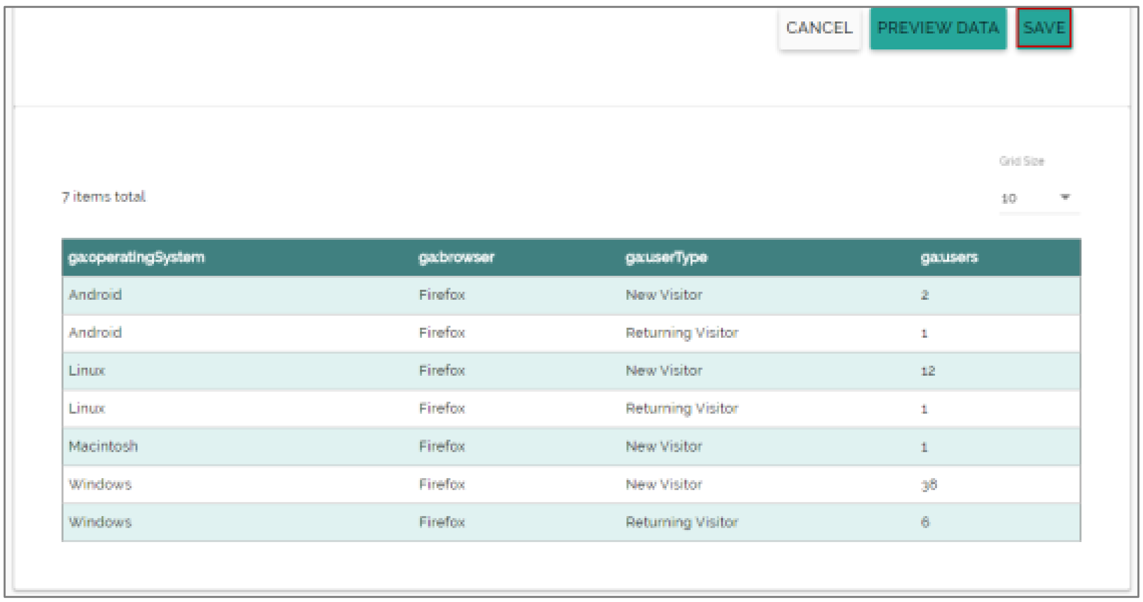


f. Apply Filter: Enable the filter option. The filter query will be displayed below.
g. Time Range: Define a time range selecting ‘**From**’ and ‘**To**’ dates.

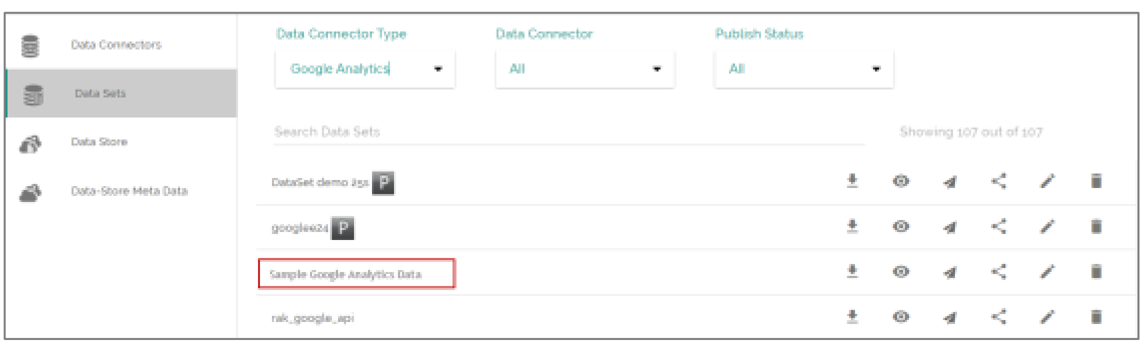
viii) Click ‘**PREVIEW DATA**’.



ix) The data preview will be displayed below in the tabular format.
x) The **Save**’ option will be enabled.
xi) Click ‘**Save**’.

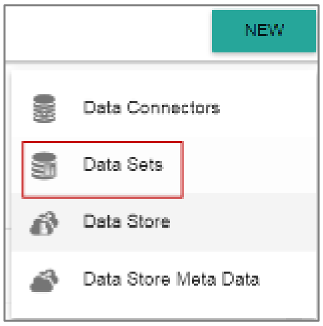


xii) Users will be directed to the data set list.
xiii) The newly created Google Analytics dataset will be added to the list.

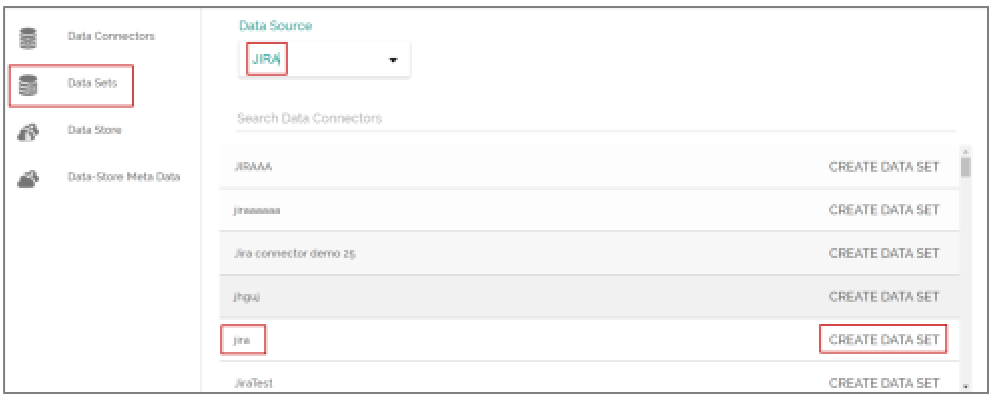


7.3.2. Jira Data Set

i) Navigate to Data Center page.
ii) Click '**New**' option and select Data Set from the context menu.



iii) Users will be redirected to the page containing all the data connectors.
iv) Select '**JIRA**' via the '**Data Source**' filter.
v) Select a JIRA data connector from the displayed list and click '**CREATE DATASET**'.



vi) Users will be directed to a new DataSet form for JIRA data set.
   a. Enter any user-defined name for the new data set.
   b. Description: Brief description about data set. (It is an optional field).
   c. Data Connector Name: This option will be predefined (the selected data connector name will appear).

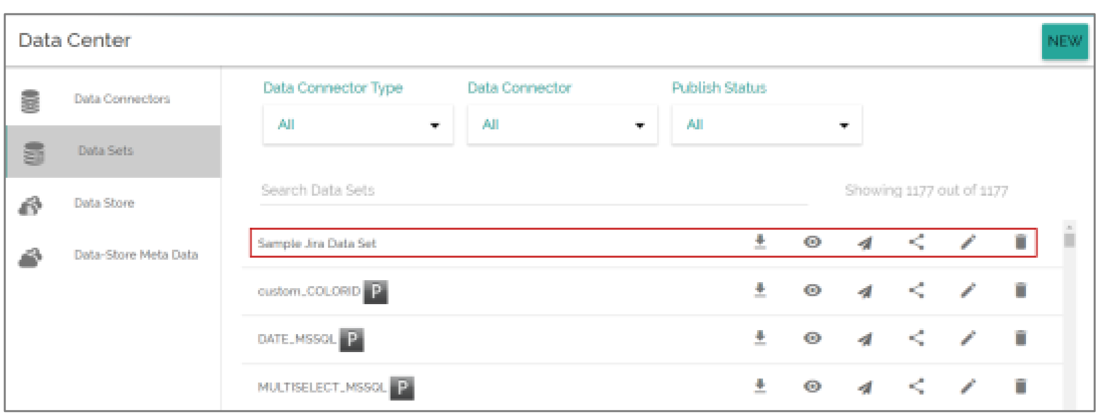
vii) Fill in the following information:
   a. Service Name: Enter any user defined name for the new data set.
   b. Description: Brief description about data set. (It is an optional field).
   c. Data Connector Name: This option will be predefined (the selected data connector name will appear).

d. Report Selection
   i. Report Type: Select a report type using the drop-down menu.
   ii. Sub-Report Type: Select a sub-report type using the drop-down menu (If the selected report type does not have a sub-report type, then this field may not appear in the form).
   iii. Columns: Select the required columns from the drop-down menu. The selected column names will be mentioned in the form.

viii) Click ‘**PREVIEW DATA**’

ix) The data preview will be displayed below in the tabular format.
x) The **Save**’ option will be enabled.
xi) Click ‘**Save**’.

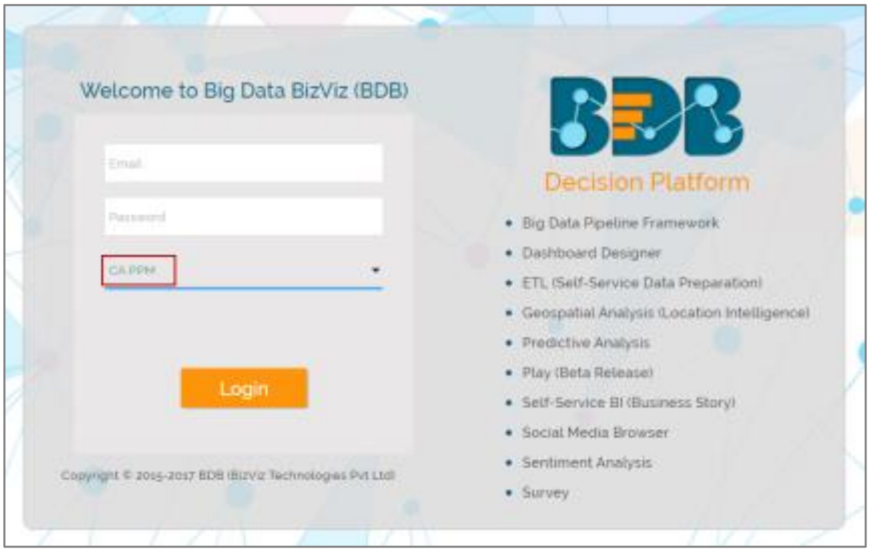
xii) Users will be directed to the data set list.
xiii) The newly created Jira data set will be added to the list.



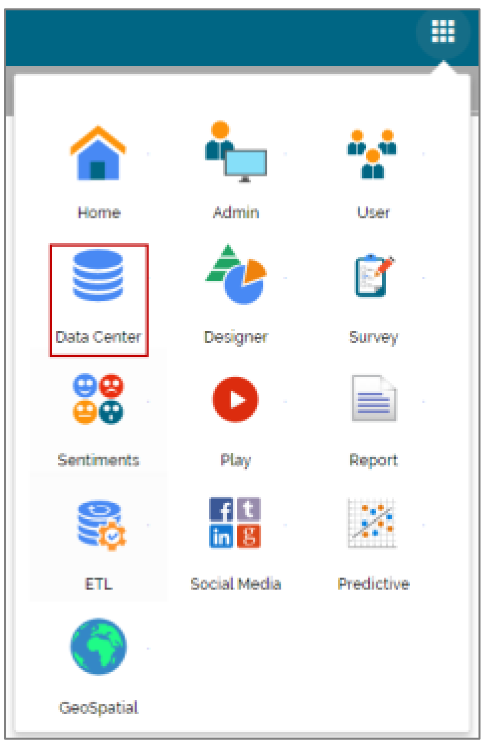
7.3.3. CA Data Set

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

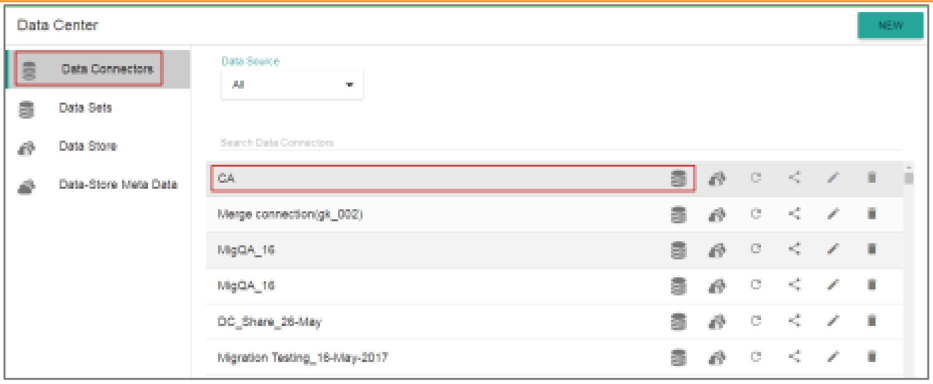
i) Login to the platform using the CA PPM authentication option.



ii) Select Data Center from the Apps menu.



iii) Users will be redirected to the Data Connector list.
iv) The '**CA**' default connector will be provided in the data connector list.

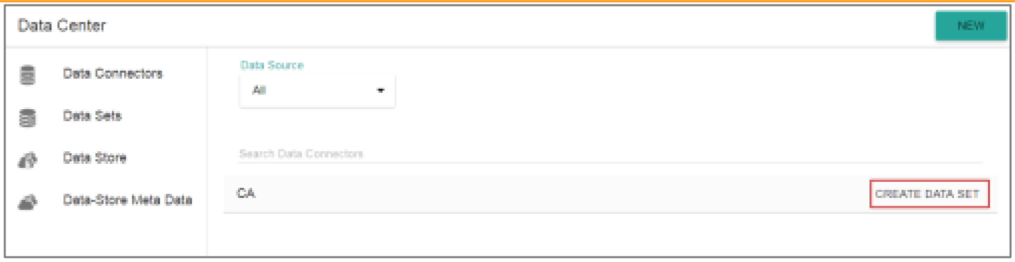


v) Click ‘**Create New Data Set**’ option
vi) Users will be redirected to the Data Set form.
vii) Configure the following information to create a data set:
1. Provide a ‘**Service Name**’.
2. Select a ‘**Service URL**’ from the drop-down menu.
3. Select a ‘**Mandatory Filter**’ from the drop-down menu.
4. Select a ‘Custom Filter’ from the drop-down menu.
5. Click ‘**SAVE**’.

viii) A new data set will be added in the data set list.

Note:

a. Users can not access any other option (NEW DATA STORE, Reconnect, Share, Edit, Delete) except ‘**New Data Set**’ while using the CA default data connector.
b. Clicking ‘**NEW**’ option on the Data Set form will redirect users to access the ‘**CREATE DATA SET**’ option from the Data Connector List.



7.4. Creating a New Data Store

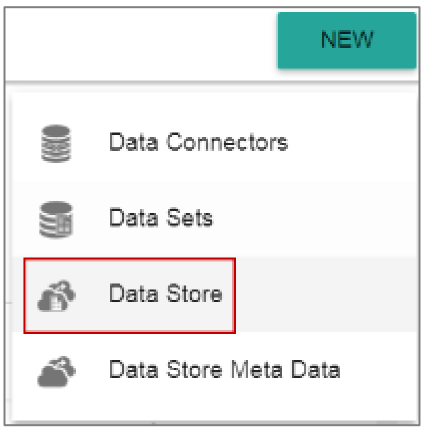
This section explains steps to create a new data store.

i) Navigate to the Data Center page.

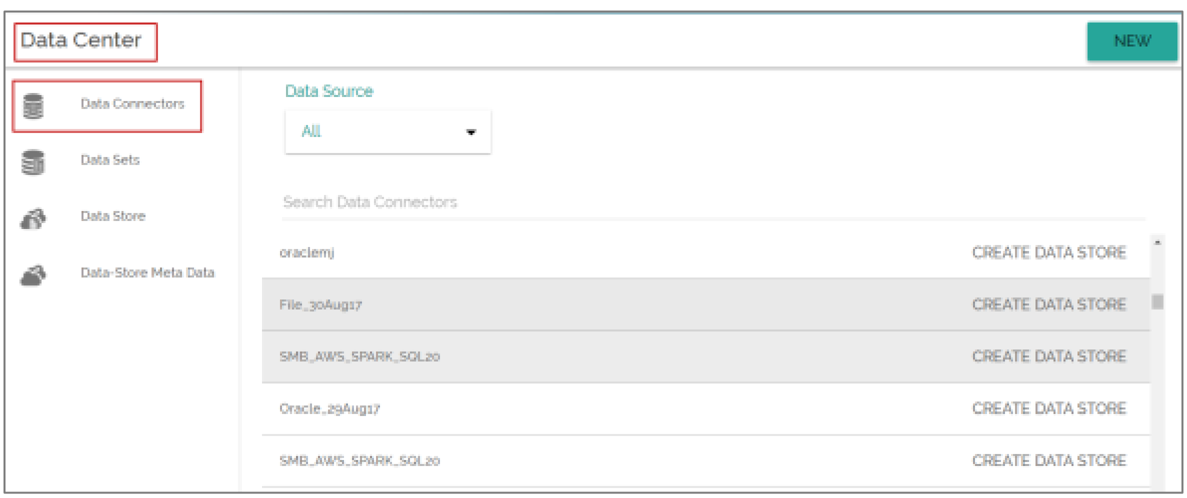
ii) Click '**NEW**'

iii) A context menu opens.

iv) Select '**Data Store**' from the context menu.



v) Users will be directed to the following page.



vi) Select a Connector Type from the '**Data Source**' filter.

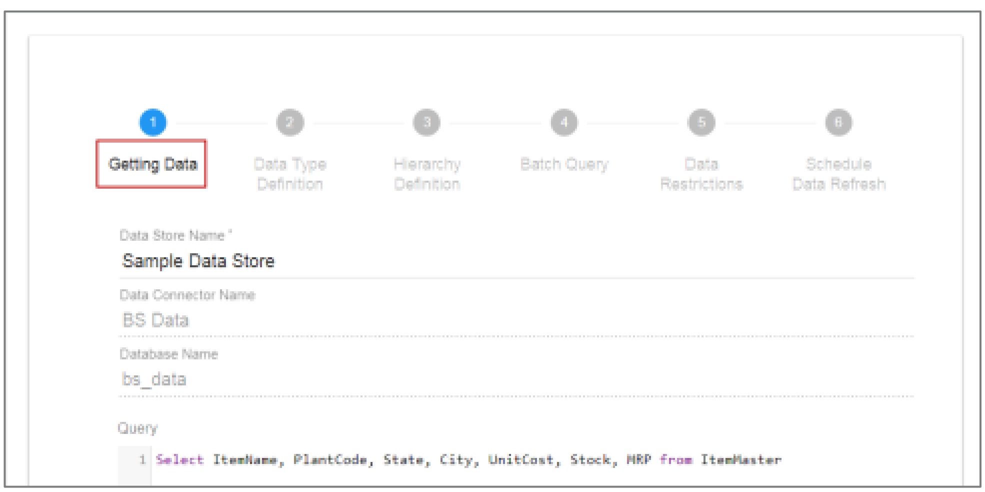
vii) Select a data connector from the '**Data Connector**' list.
viii) Click the '**CREATE DATASET**' option provided next to the selected data connector.

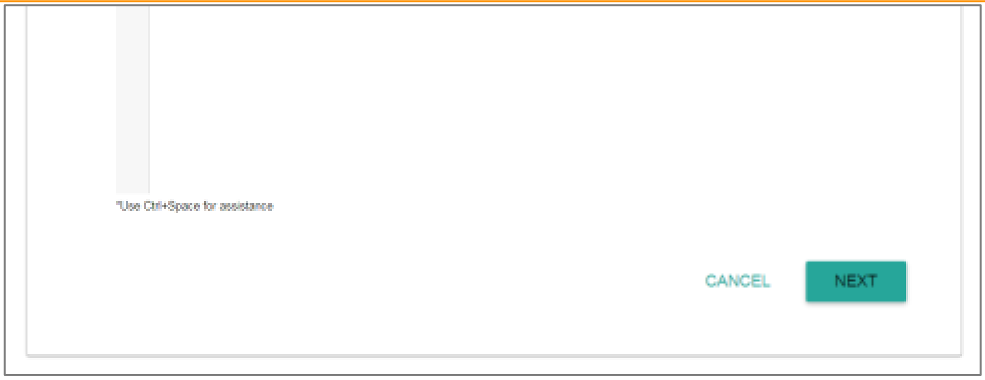
ix) Users will be directed to get data for creating a Data Store.

7.4.1. Getting Data

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

i) **Data Store Name:** Enter a name for the data store.
ii) **Data Connector Name:** It will be preselected (Name of the selected data connector will be displayed in this field)
iii) **Database Name:** It will be preselected based on the selected data connector.
iv) **Query:** Write query in the given space. (Use '**Ctrl+Space**' for assistance in writing a query.)
v) Click '**NEXT**' to proceed on the next tab.

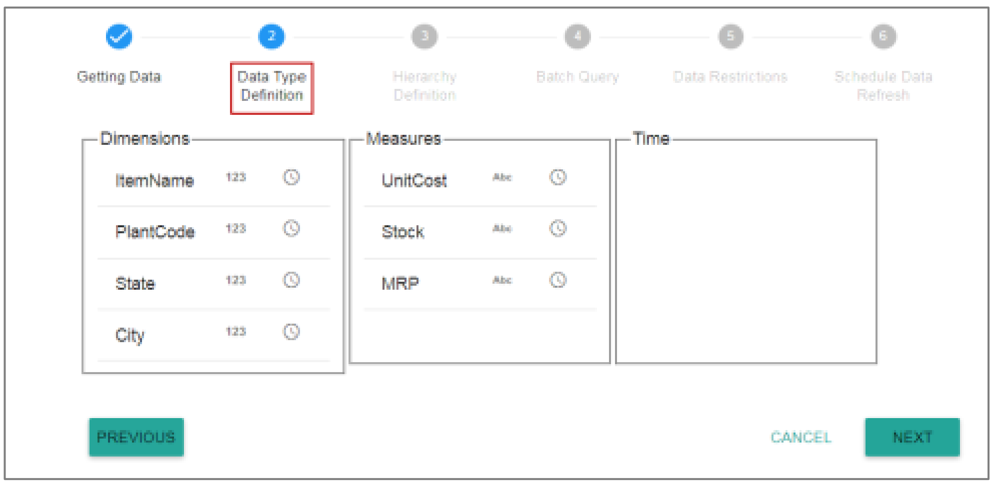




7.4.2. Data Type Definition

i) Users will be directed to choose required Dimensions, Measures, and Time options from the selected data set.

ii) Click ‘**NEXT**’ to proceed on the next tab.



Note:

a. Users can change the categories of a dimension, measure, and time values by clicking the following options:

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

b. Click ‘**PREVIOUS**’ to go back to the previous tab.

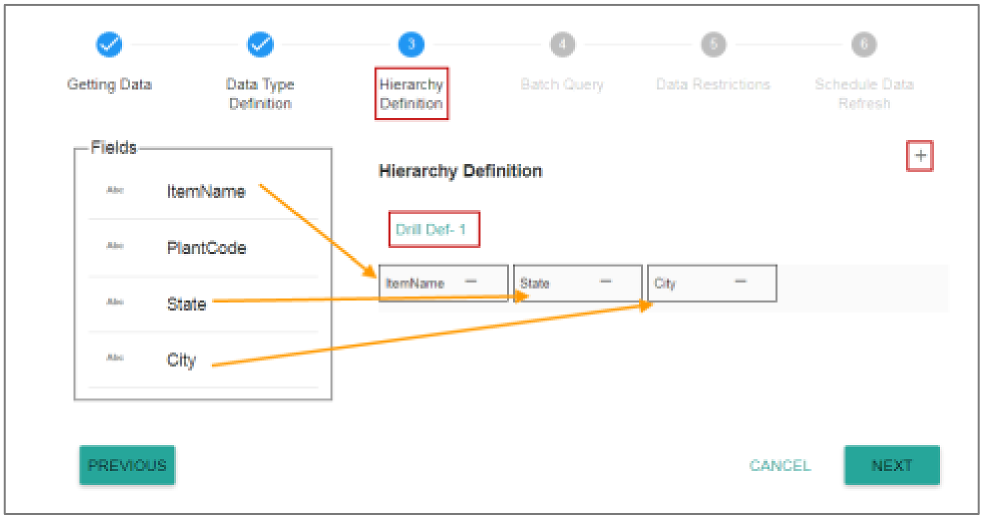
7.4.3. Hierarchy Definition

Define hierarchy using various dimensions and time options.

i) Click the ‘**Add**’ option + provided on the Hierarchy Definition window.

ii) A new ‘**Drill Def**’ box will be added.

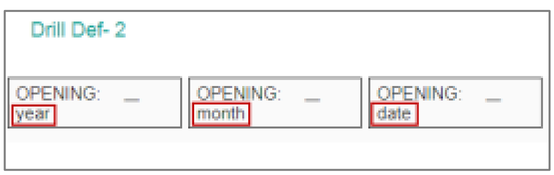
iii) Drag and drop the dimensions or time options to define hierarchy.



iv) Click ‘**NEXT**’ to proceed on the next tab.

Note:

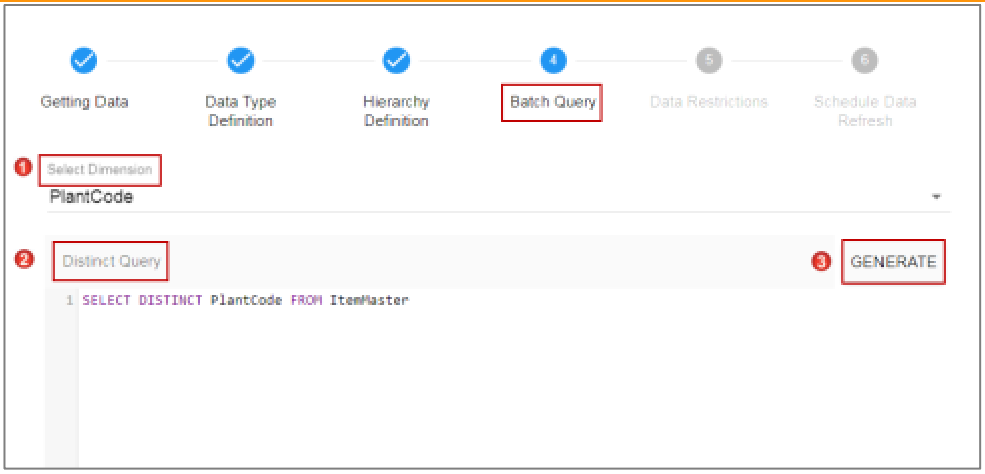
a. Click ‘**PREVIOUS**’ to go back to the previous tab.
b. Click the ‘**Remove**’ option — (in the Drill Def box) to remove the defined hierarchy using the selected option.
c. The ‘**Date Drill**’ functionality is available for the Time dimensions. By default, the Time dimensions will be split into Year>Month>Date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



7.4.4. Batch Query

Split the data fetching process into different batches by generating a batch query.

i) Select a Dimension using the drop-down menu.
ii) Click ‘**Generate**’.
iii) Based on the selected dimension a distinct query will be generated (in the below-given box).



iv) Users can edit the distinct query as per their requirement.

v) Click ‘**Generate**’ option provided for the ‘**Batch Query**’.

vi) The original query will be generated with the distinct query specifications to fetch data.

vii) Click ‘**NEXT**’ to proceed on the next tab.

7.4.5. Data Restriction

Configure the settings to restrict a user-level view of the data store.

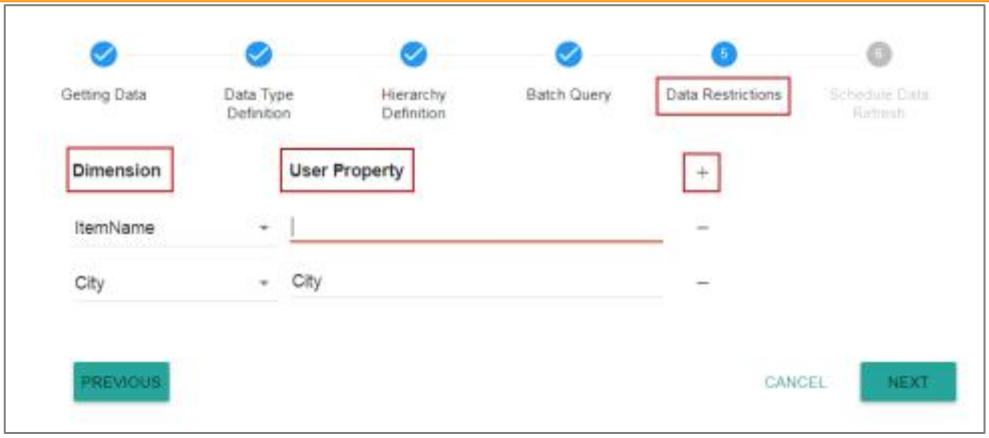
i) Click ‘**Add**’ ✚ to add a new box for inserting the data restriction parameter.

ii) Fill in the following information:

a. **Dimension**: Select a dimension using the drop-down menu

b. **User Property**: Enter user/group specific custom field.

iii) Click ‘**NEXT**’ to proceed on the next tab.



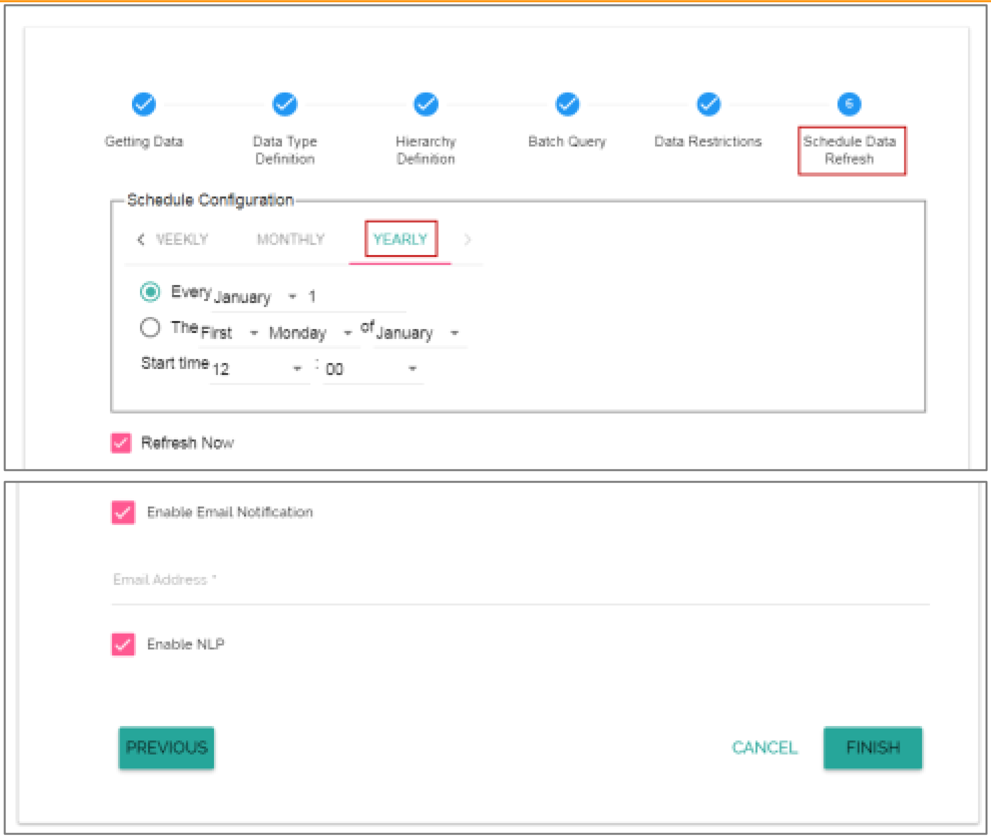
Note: The Administrator can restrict access of data for a specific user by configuring the User Property via the '**Data Restriction**' tab.

E.g. If for a user/user group '**City**' custom field is provided value '**Bangalore**' and the administrator passes '**City**' as User Property while creating a data store. Users for whom '**Bangalore**' was selected as value for the '**City**' custom field will be able to access data store data referring only to the Bangalore city.

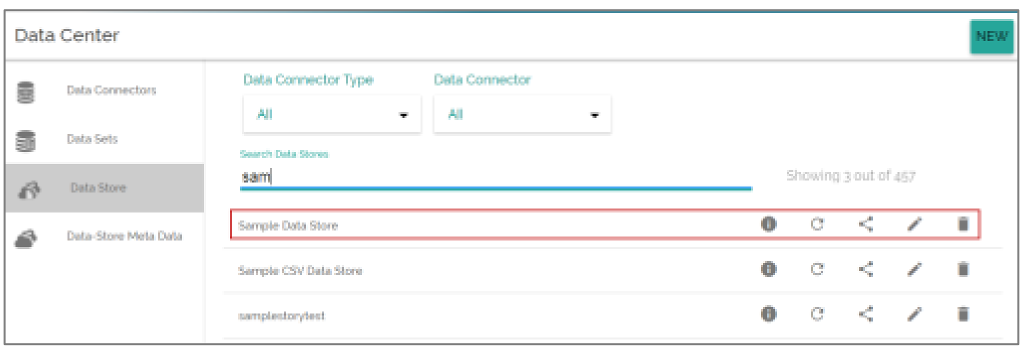
7.4.6. Schedule Data Refresh

Use this option to configure data refresh interval.

i) The following options are provided to refresh the data:
   a. Daily
   b. Weekly
   c. Monthly
   d. Yearly
ii) Select any one option from the above-given list to set the data refresh interval.
iii) Select the '**Refresh Now**' option by enabling the box to refresh the data store immediately after it has been created.
iv) Enable Email Notification by enabling the option.
v) Provide the Email Address on which you want the notification email to be sent.
vi) Enable NLP service by check marking in the box.
vii) Click '**FINISH**'



viii) A message will pop-up to confirm that the data store configuration has been saved.
ix) Users will be redirected to the Data Store List.
x) A new data store will be created and added to the displayed list.

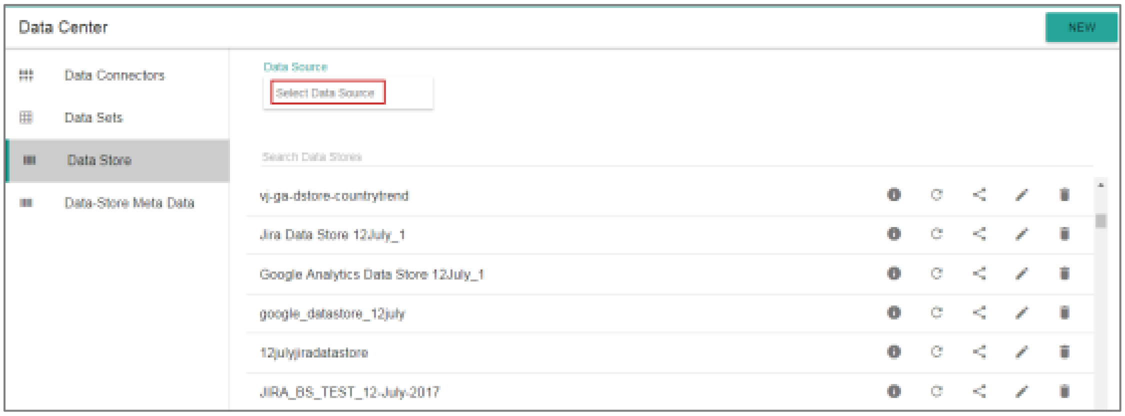


Option	Name	Task
	Latest Scheduler Status	Display the latest scheduler status via a pop-up window
	Refresh Data	Refresh data for a data store
	Share Data Store	Share/unable a data store to/for the selected user(s) or group(s)
	Edit	Edit the data store fields

	Remove	Remove a data store from the list

Note:

a. ‘**Getting Data**’ tab opens by default while creating a new data store.
b. Click ‘**PREVIOUS**’ to be redirected to the previous page.
c. Users can click ‘**CANCEL**’ to cancel the creation of a new data store at any step.
d. Enabling NLP service will allow the ‘Data Search’ bar provided on the Storyboard of the Business Story to display data from the selected data store.
e. Users can filter the created data stores by data source. The Data Store list page has been provided by a filter, users need to select a data source using it.

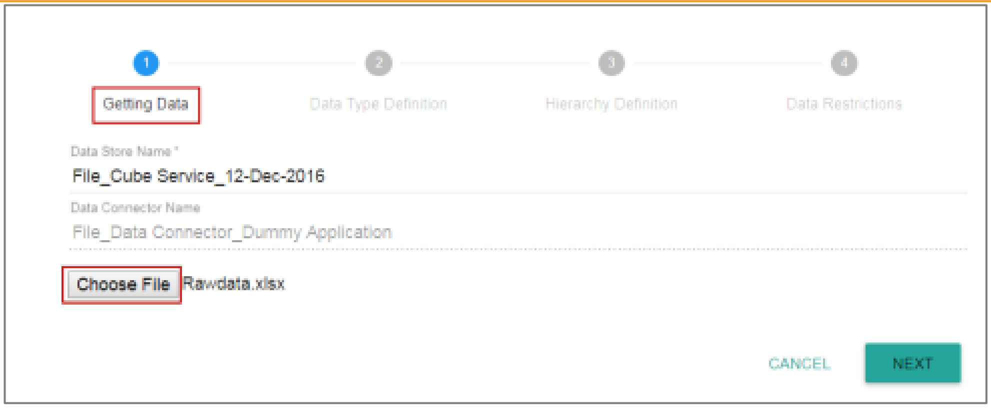


f. Take care of the following steps while creating a Data Store based on either Google Analytics or JIRA data connectors:
   i. Choose a Google Analytics/JIRA data connector from the list of the data connectors.
   ii. Select a data set based on Google Analytics/JIRA data connector from the Data Store form using a drop-down under ‘**Getting Data**’ tab.
   iii. The rest of the steps are as described above.

7.4.7. Creating a New Data Store using a Flat File Data Connector

Step 1- Getting Data

i) Fill in the following information:
   a. **Data Store Name**: Enter a data store name.
   b. **Data Connector Name**: It will be preselected (Name of the selected data connector will be displayed in this field).
ii) Click **‘Choose File’** to browse a file from the system.
iii) Click ‘**Next**’ to proceed on the next tab.

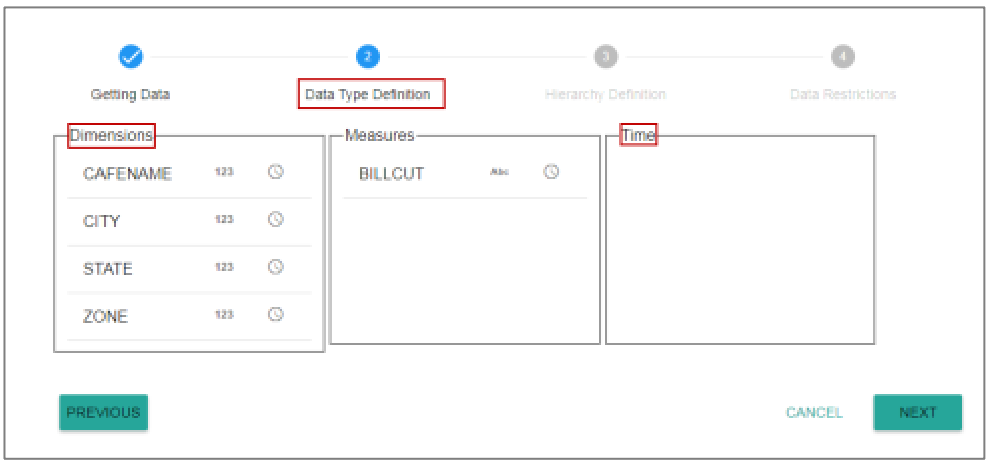


Note: Choose an Excel or CSV file as file data connector.

Step 2- Data Type Definition

i) Users will be directed to choose required Dimensions, Measures, and Time options from the selected data set.

ii) Click '**NEXT**' to proceed on the next tab.



Step 3- Hierarchy Definition

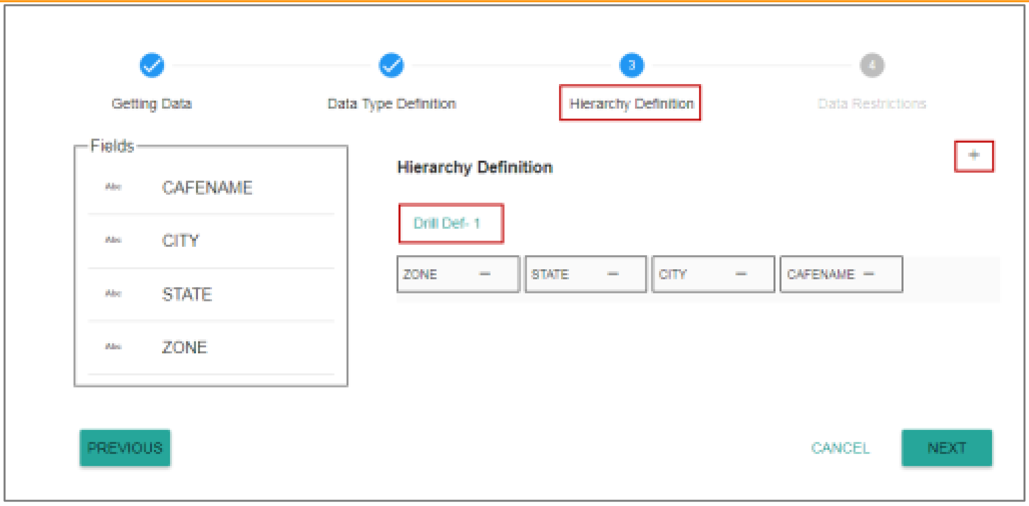
Define hierarchy using various dimensions and time options.

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

ii) A new '**Drill Def**' box will be added.

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

iv) Click '**Next**' to proceed on the next tab.



Step 4- Data Restriction

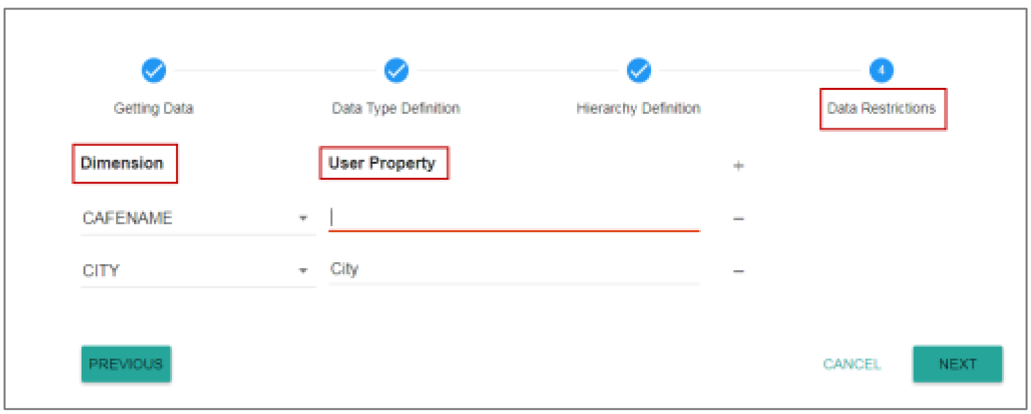
i) Click '**Add**' **+** to add a new box for inserting the data restriction parameter.

ii) Fill in the following information:

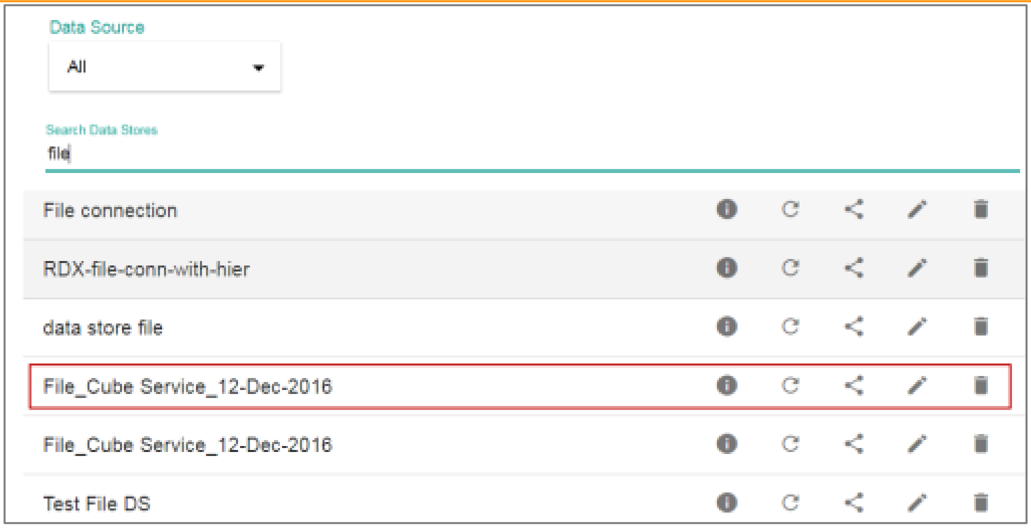
a. **Dimension**: Select a dimension using the drop-down menu

b. **User Property**: Enter user property value (It should be the same as the selected dimension)

iii) Click '**Next**' to proceed on the next tab.



iv) The newly created data store will be added in the Data Store list.



Note:

a. The Administrator can restrict access of data for a specific user by configuring the User Property via the '**Data Restriction**' tab.
E.g. If for a user/user group '**City**' custom field value is '**Bangalore**' and the administrator passes '**City**' as User Property while creating a data store. Users for whom '**Bangalore**' was selected as value for the '**City**' custom field will be able to access data related only to Bangalore city from the data store.

b. '**Getting Data**' tab opens by default while creating a new data store.

c. Click '**PREVIOUS**' to be redirected to the previous page.

d. Users can click '**CANCEL**' to cancel the creation of a new data store at any step.

7.5. Data Store Meta Data

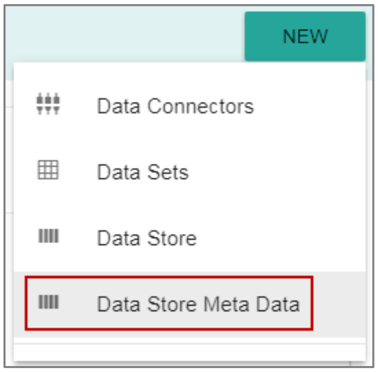
This feature allows users to define metadata for Data Store.

i) Navigate to the Data Center page.

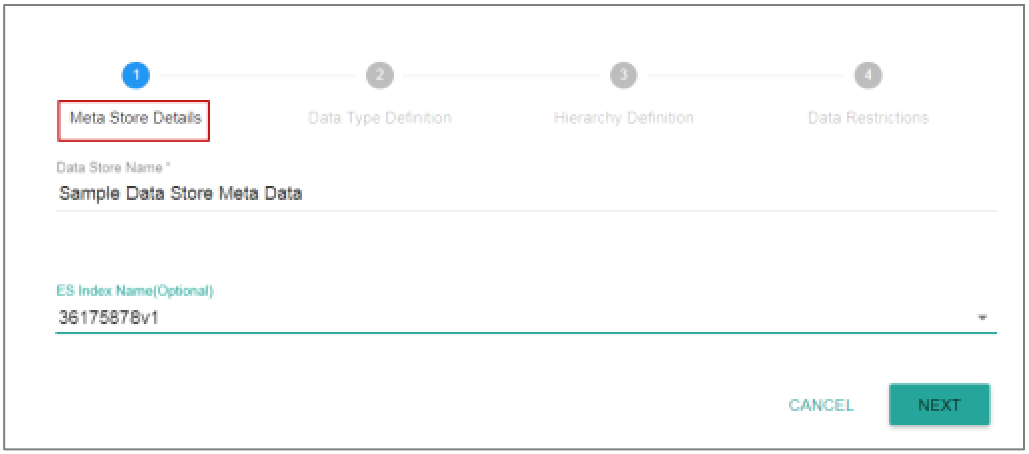
ii) Click '**NEW**'

iii) A context menu opens.

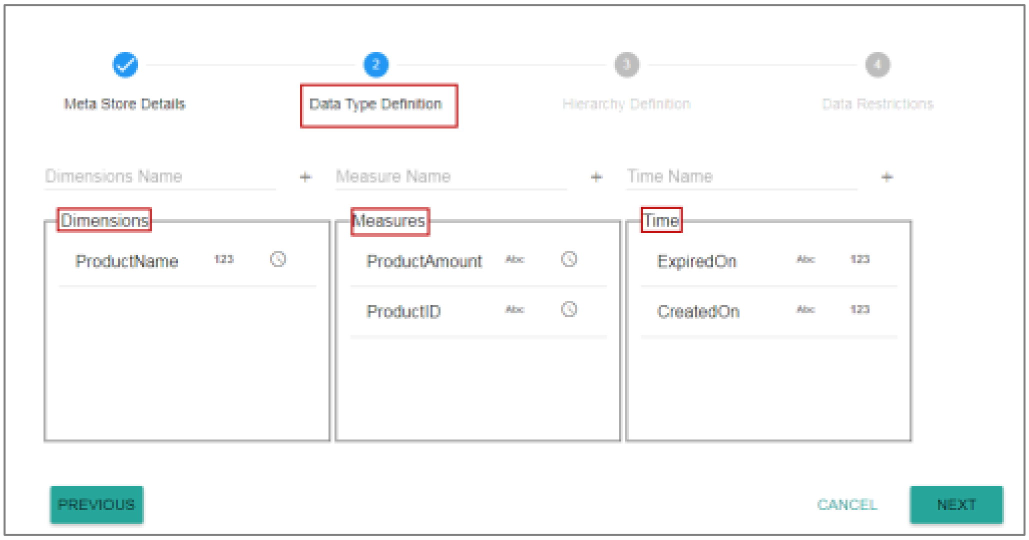
iv) Select '**Data Store Meta Data**' from the context menu.



v) Users will be directed to get Meta Store details.
vi) Enter a Data Store Name.
vii) Choose an ES Index number from the drop-down list.
viii) Click ‘**NEXT**’.



ix) Users will be directed to define the data type.
x) Select the required Dimensions, Measures, and Time options.
xi) Click ‘**NEXT**’



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

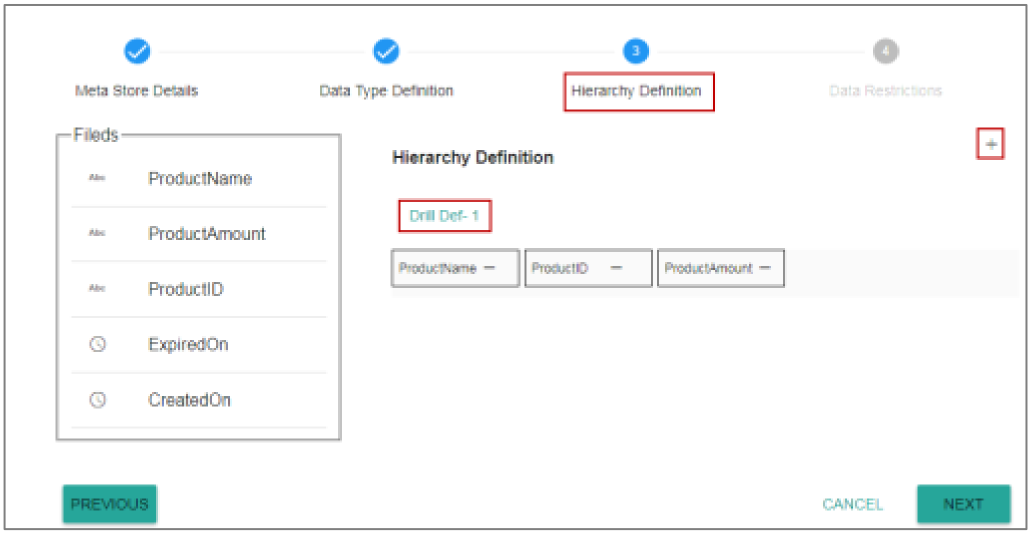
Options	Description
Abc	Move to Dimensions
123	Move to Measures
	Move to Time

xii) Users will be directed to define the hierarchy using Dimensions and Time dimensions.

a. Click the ‘**Add**’ option + provided on the Hierarchy Definition window.

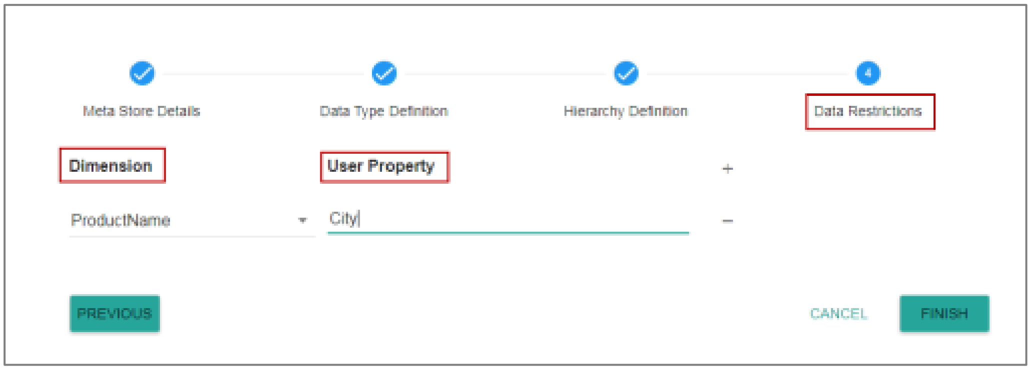
b. A new '**Drill Def**' box will be added.
c. Drag and drop the dimensions or time options to define hierarchy.

xiii) Click '**NEXT**'.



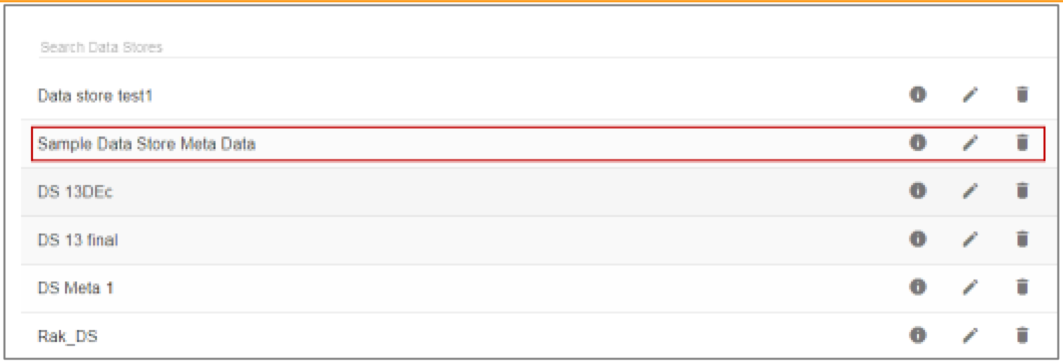
xiv) Users will be directed to the '**Data Restrictions**' page.
a. Select a dimension from the drop-down menu to apply filter values on the data store.
b. Enter a User Property value to create a filter parameter.

xv) Click '**FINISH**'.



xvi) A pop-up window will appear to confirm that the configuration has been saved.

xvii) Newly created Meta Data will be added to the list displayed on the left pane of the page.



Option	Name	Task
	Latest Scheduler Status	Display the stored information via a pop-up window
	Edit	Edit the data store meta data fields
	Remove	Remove a data store metadata from the list

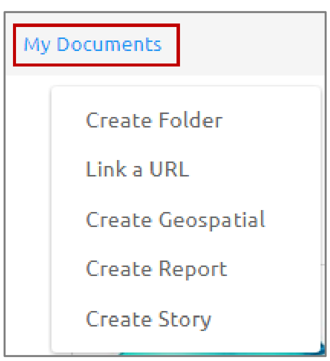
Note: The Data Restriction tab will allow the user/user group to access data as per the selected '**User Properties**'.

8. Options

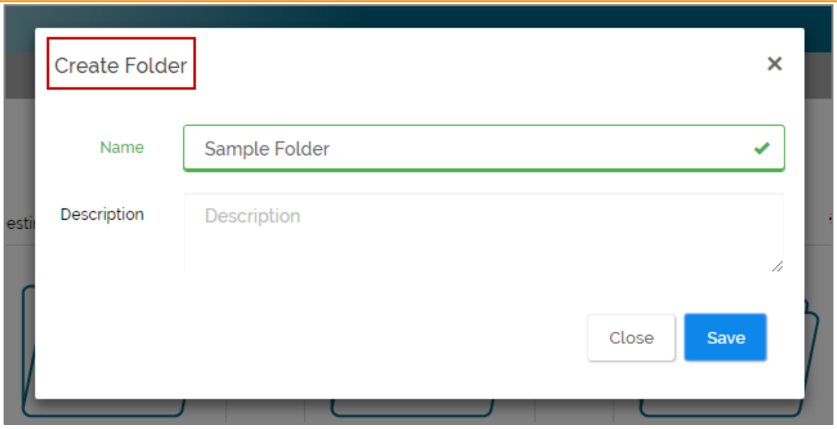
Users can access various options by using right-click anywhere on the '**My Documents**' or '**Public Documents**'.

8.1. Creating a Folder

i) Navigate to the platform home page.
ii) Open '**My Documents**' or '**Public Documents**'.
iii) Right-click anywhere on the My Documents or Public Documents space.
iv) A context menu opens.
v) Select '**Create Folder**' from the context menu.

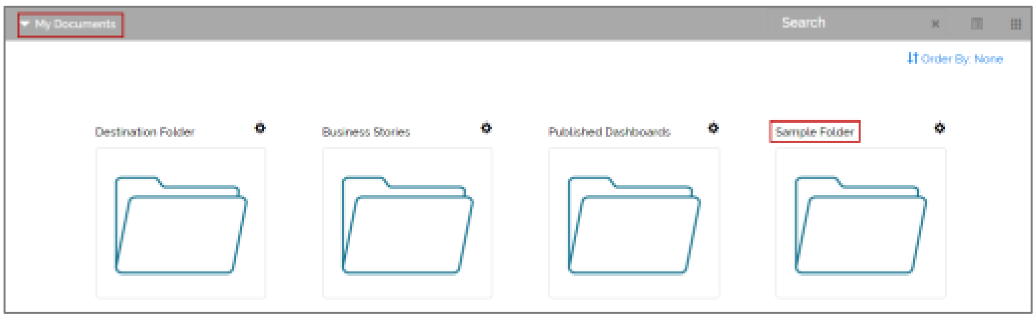


vi) A pop-up window will appear.
vii) Fill in the following information:
   a. **Name**: Enter a folder name
   b. **Description**: Describe the folder (optional)
viii) Click '**Save**'.



ix) A success message will pop-up.

x) The folder will be created.



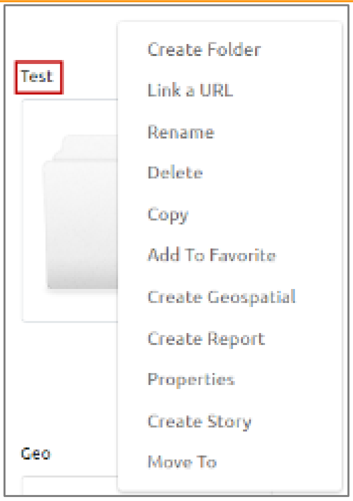
- **Options Assigned to a Folder**

  A single folder is credited with various options. All the options provided to a folder are described over here:

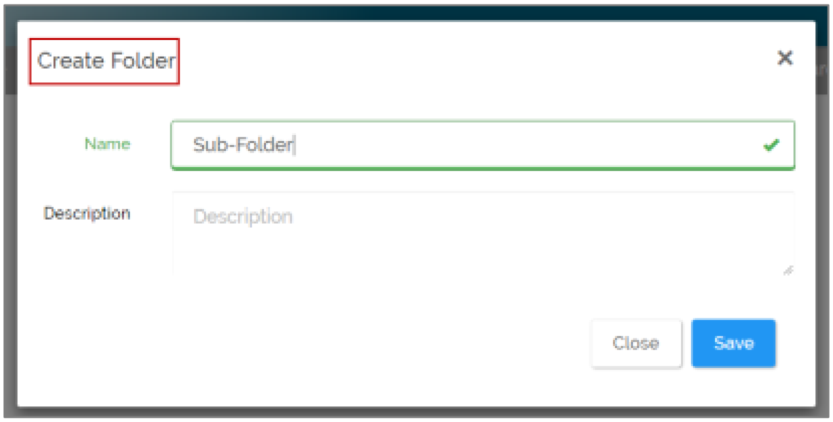
8.1.1. Creating a Folder (Sub-Folder)

i) Select a folder.

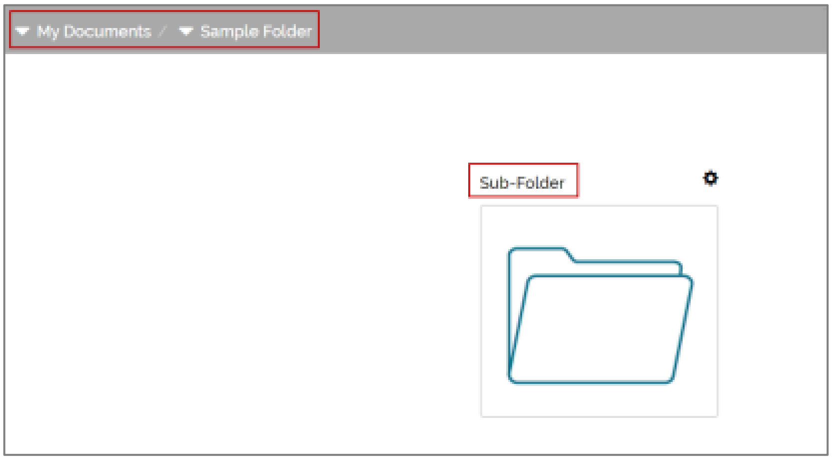
ii) Click the ‘**Settings**’ icon for options.



iii) Select '**Create Folder**'.
iv) A new window pops-up.
v) Fill in the following information:
  a. **Name**: Enter a folder name
  b. **Description**: Describe the folder (optional)
vi) Click '**Save**'.



vii) The (sub) folder will be created.



Note: User can create multiple sub-folders under a folder.

8.1.2. Linking a URL

This functionality enables users to link the URLs with the required documents.

i) Select a folder.

ii) Click the '**Settings**' icon for options.

iii) Select '**Link a URL**'.

iv) A new window pops-up.

v) Fill in the required information:

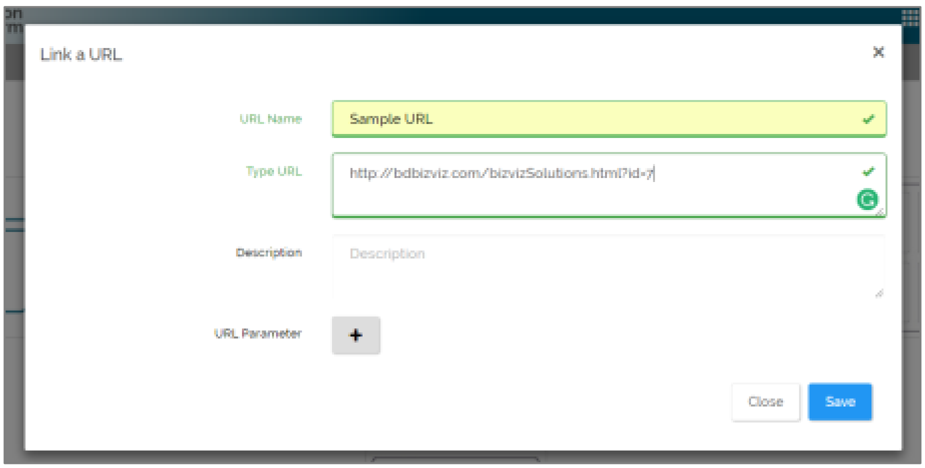
a. **URL Name**: Enter a name for the URL

b. **Type URL**: Type the URL link that you wish to add

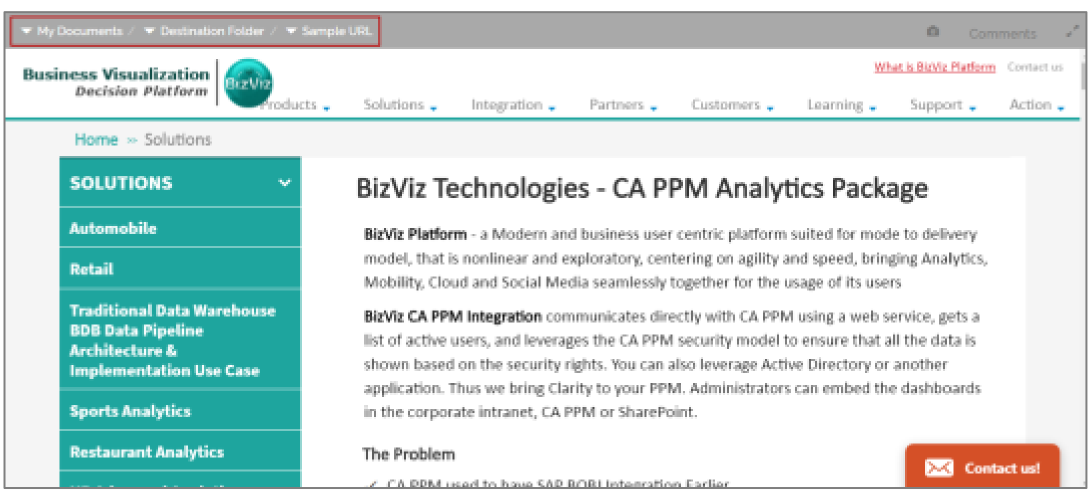
c. **Description**: Describe the URL (optional)

d. **URL Parameter (Optional)**

vi) Click '**Save**'.



i) The URL will be linked to the folder.

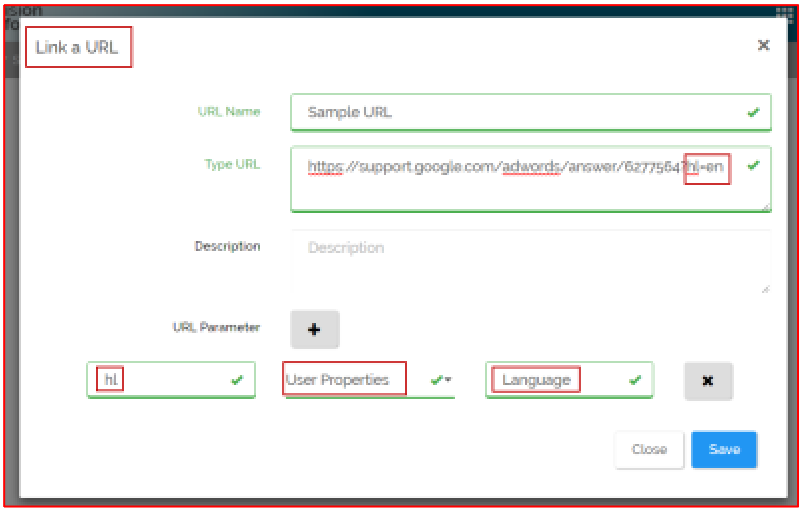


8.1.2.1. Adding or Removing a URL Parameter:

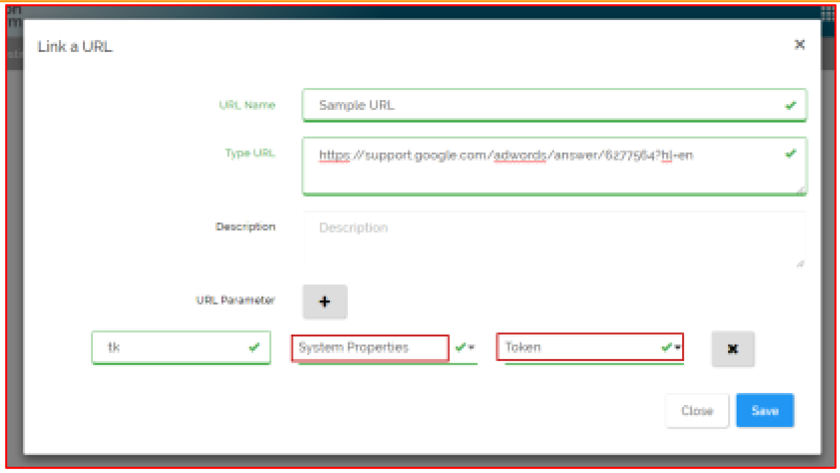
Users can add URL parameters to the linked URLs. URL parameters are made of a key and value separated by an equal sign (=) and joined by a sign (&).

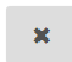
i. Click the '**Add**' button ✚ to add a URL Parameter.
   Users need to provide required information as described below:
   1. Enter the Parameter name.
   2. Select a property option using the drop-down menu.
      a. User Properties
      b. System Properties

   3. This field will be displayed only after selecting a property option via the 'User Properties' drop-down menu:
      a. Selecting the '**User Properties**' will need administrator to link the added parameter with a valid user custom field. (E.g. 'hl' has been linked with 'Language' custom field provided for a user in the below image.



      b. Selecting the '**System Properties**' will need administrator to select an option from the drop-down menu.



ii. Click the '**Remove**' button  to remove the inserted URL Parameter.

8.1.3. Renaming a Folder

i) Select a folder.

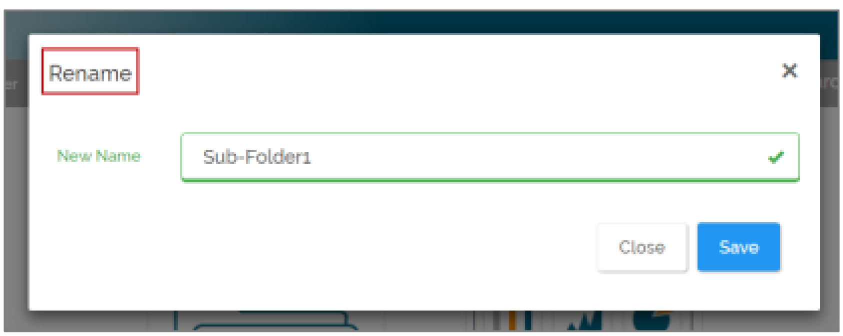
ii) Click the '**Settings**'  icon for options.

iii) Select '**Rename**'.

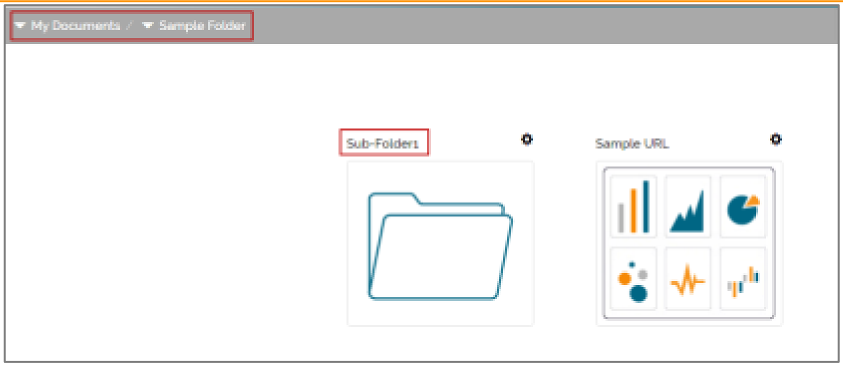
iv) A new window pops-up.

v) Enter '**New Name**' for the folder.

vi) Click '**Save**'.



vii) The folder will be renamed.



8.1.4. Deleting a Folder

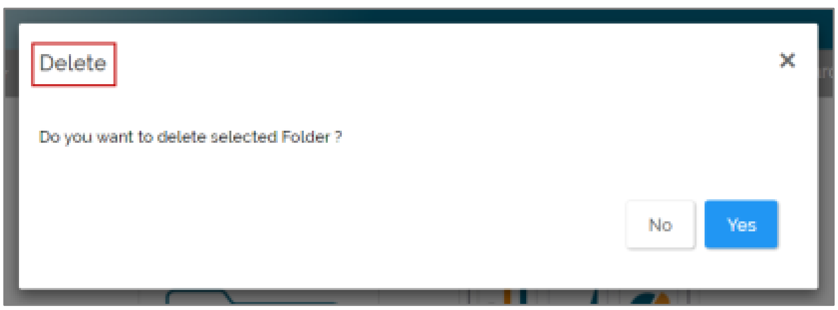
i) Select a folder.

ii) Click the ‘**Settings**’ icon for options.

iii) Select ‘**Delete**’.

iv) A new window pops-up to assure the deletion.

v) Click ‘**Yes**’.



vi) The selected folder will be deleted.

Note: Delete option is not available to the folders created or shared as the Public Documents.

8.1.5. Copying a Folder

System users can copy a folder and paste it to a different folder.

i) Select a folder.

ii) Click the ‘**Settings**’ icon for options.

iii) Select ‘**Copy**’.

iv) Select another folder and click the ‘**Settings**’ icon.
Or
Navigate to ‘**My Documents**’ or ‘**Public Documents**’ and right-click anywhere.

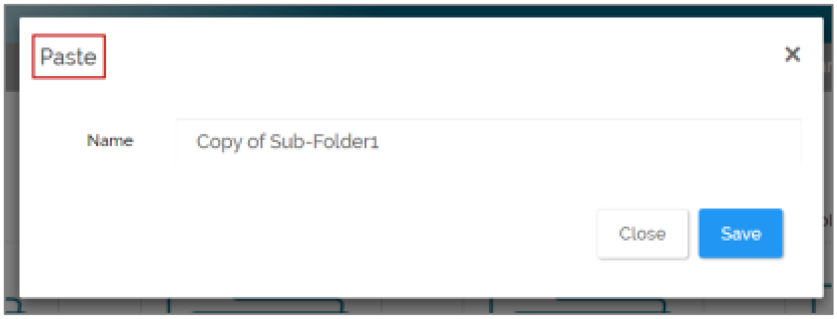
v) A context menu will appear with the ‘**Paste**’ option.

vi) Select ‘**Paste**’.

vii) A pop-up window will appear.

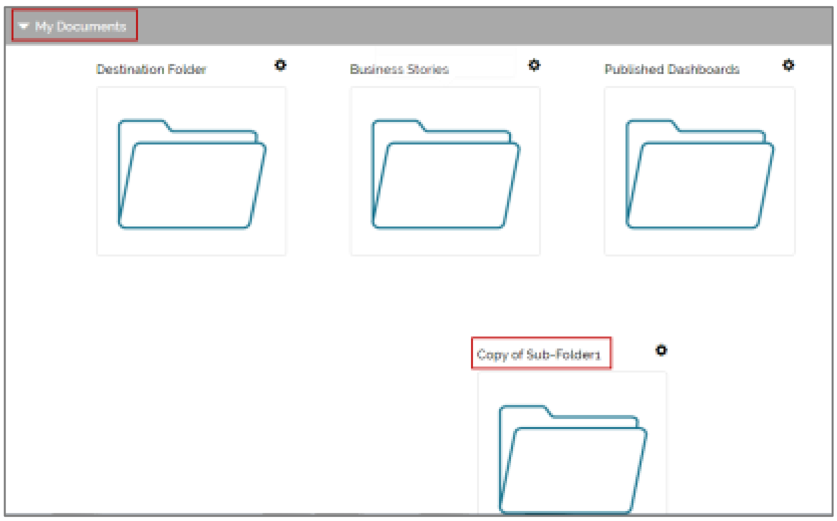
viii) The **Name** mentioned in the pop-up window shows prefix ‘**Copy of-**’ before the original name of the folder (E.g. *Sample Folder 1* will have a new name *Copy of Sample Folder 1*).

ix) Click ‘**Save**’.



x) A Message pops-up to assure that the copied folder has been copied successfully with a different name.

xi) The following image shows that *Sample Folder 1* from ‘**My Documents**’ is named *Copy of Sample Folder 1* and has been copied to ‘**Public Documents**’.



8.1.6. Adding/Removing a Folder to/from Favourites

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

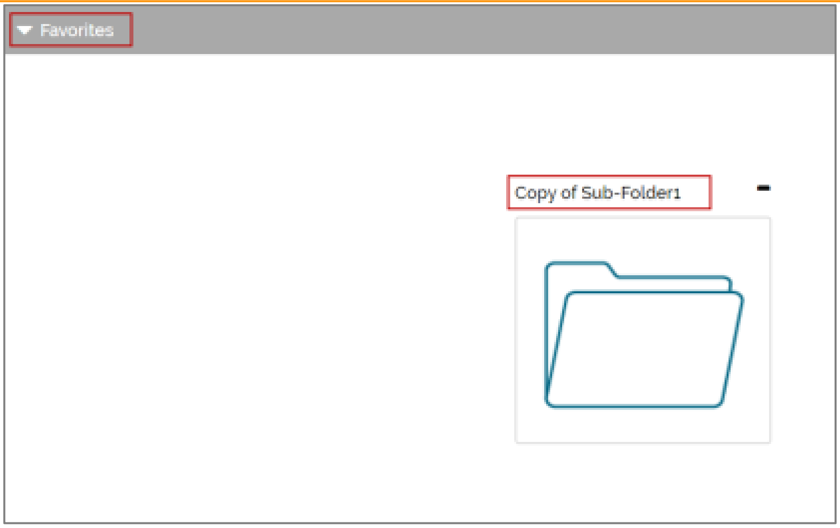
i) Select a folder.

ii) Click the ‘**Settings**’ icon for options.

iii) Select ‘**Add to Favorite**’.

iv) A new window pops-up with a message, “**Folder added to Favorite**”.

v) The selected folder will be added to ‘**Favorites**’.



vi) Open '**Favorites**'.

vii) Navigate to the folder you wish to remove from '**Favorites**'.

viii) Click on the '**Remove**' button.

ix) A new window pops-up with a message, "**Document removed successfully!**".

x) The desired folder will be removed from '**Favorites**'.

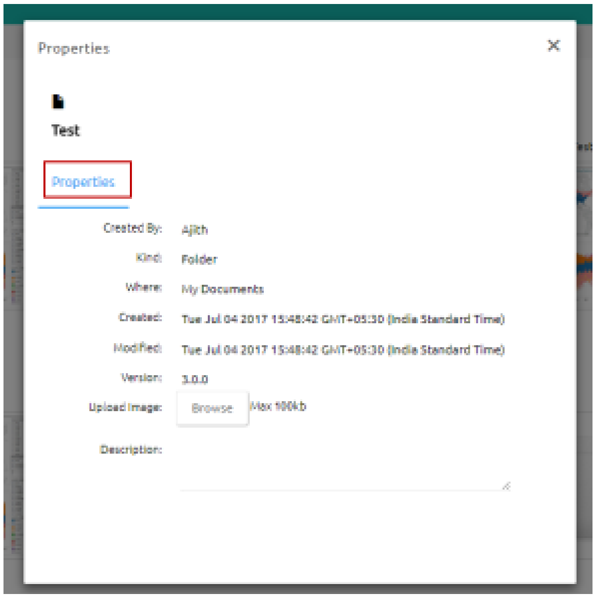
8.1.7. Properties

i) Select a folder.

ii) Click the '**Settings**' icon for options.

iii) Select '**Properties**'.

iv) The folder properties will be displayed.



8.1.8. Creating a Geospatial

i) Select a folder.

ii) Click the ‘**Settings**’ icon for options.

iii) Select ‘**Create Geospatial**’.

iv) A pop-up window will appear.

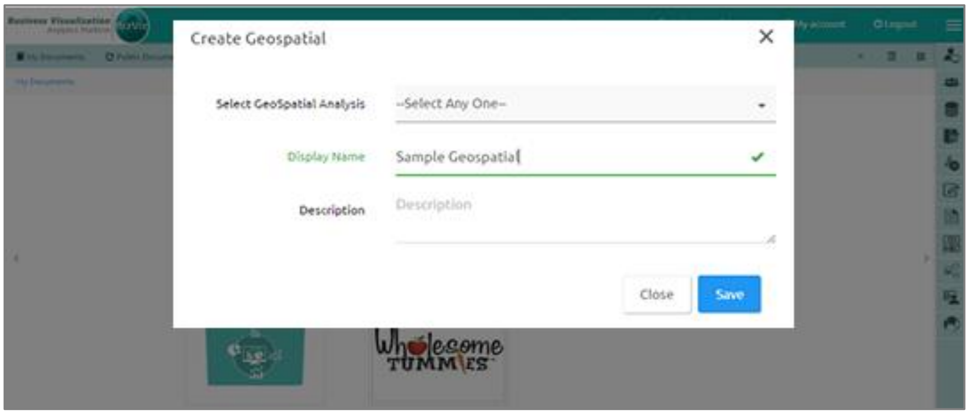
v) Fill in the following information:

a. **Select Geospatial Analysis**: Select any one option from the drop-down menu.

b. **Display Name**: Enter a name that will be displayed with the geospatial.

c. **Description:** Describe the geospatial (optional)

vi) Click ‘**Save**’.



vii) The geospatial will be created.

8.1.9. Creating a Story

i) Select a folder.

ii) Click the ‘**Settings**’ icon for options.

iii) Select ‘**Create Story**’.

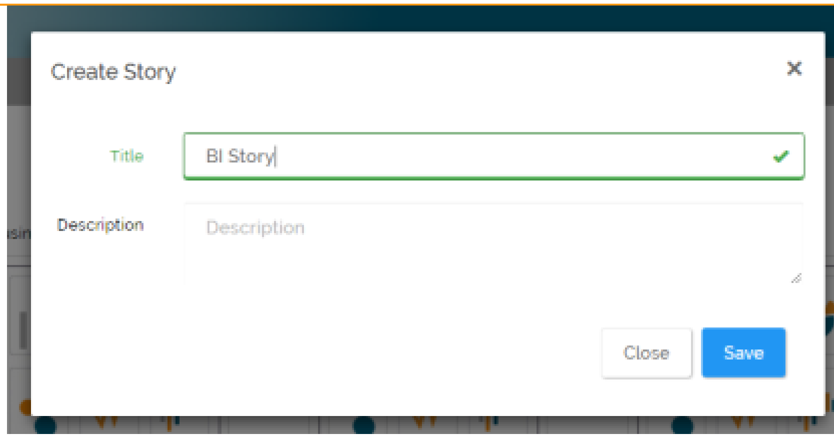
iv) A pop-up window will appear.

v) Fill in the required information:

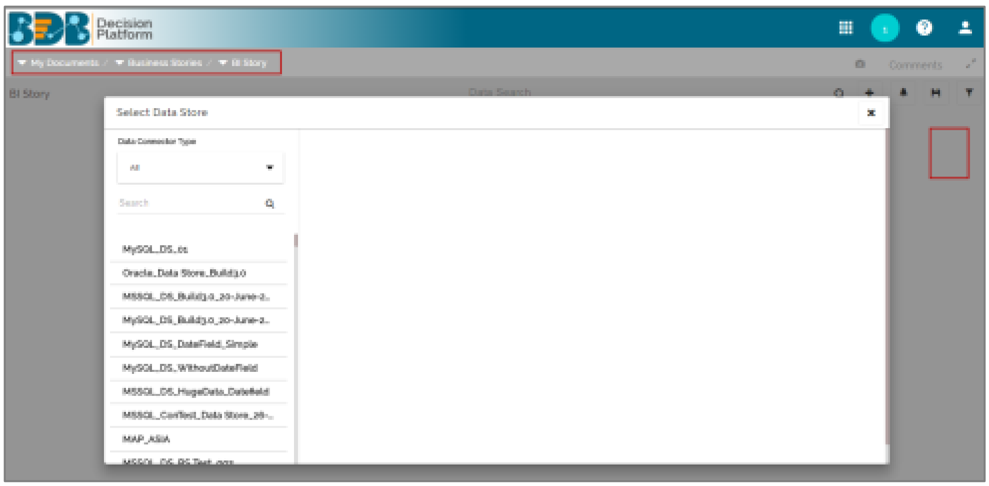
a. **Title**: Enter a title for the story document

b. **Description:** Describe the story document (optional)

vi) Click ‘**Save**’.



vii) Users will be directed to the following page of the story.



8.1.10. Moving a Folder

i) Select a folder.

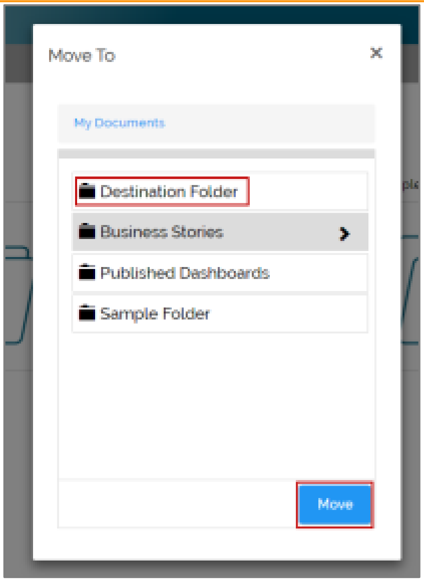
ii) Click the '**Settings**' icon for options.

iii) Select '**Move To**'.

iv) A pop-up window will appear displaying the available folders.

v) Select a folder from the pop-up window.

vi) Click '**Move**'.

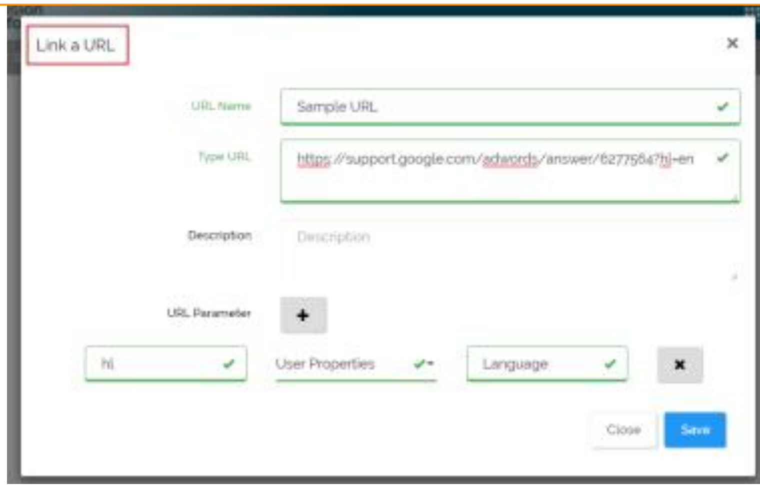


vii) A pop-up message will appear to confirm the success.
viii) The document will be moved to the selected folder.

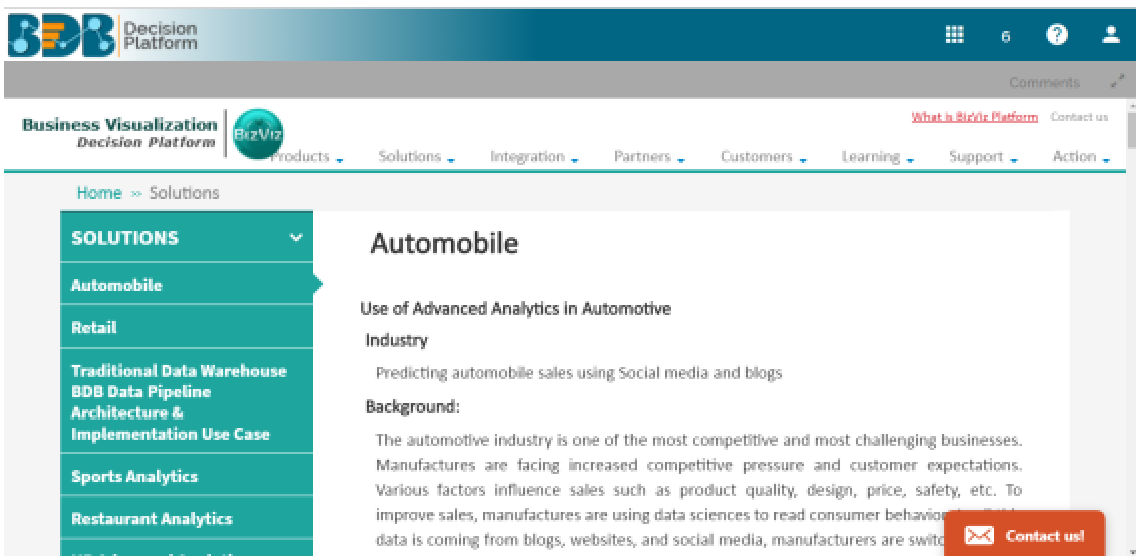
8.2. Linking a URL

This functionality enables users to link the URLs with the required documents.

i) Select a folder.
ii) Click the ‘**Settings**’ icon ⚙ for options.
iii) Select ‘**Link a URL**’.
iv) A new window pops-up.
v) Fill in the required information:
   a. **URL Name**: Enter a name for the URL
   b. **Type URL**: Type the URL link that you wish to add
   c. **Description**: Describe the URL (optional)
   d. **URL Parameter (Optional)**
vi) Click ‘**Save**’.



vii) The URL will be linked to the folder.



- **Options Assigned to a URL**

8.2.1. Modifying a Document (URL information)

i) Select a linked URL document.

ii) Click the ‘**Settings**’ icon for options.

iii) Select ‘**Modify Document**’.

iv) A pop-up window will appear.

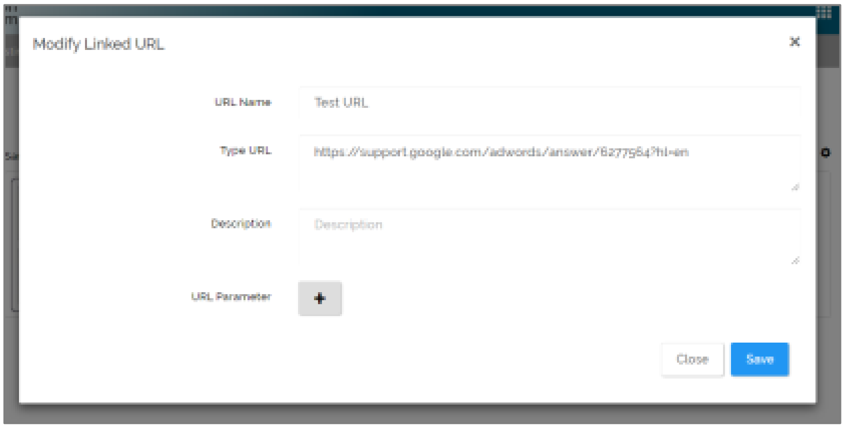
v) Modify the following information:

a. URL Name
b. URL Link
c. Description
d. URL Parameter

i. Click the ‘**Add**’ button to add the URL Parameter.

ii. Click the '**Remove**' button to remove the inserted URL Parameter.

vi) Click '**Save**'.



vii) The modified URL Link will be saved.

8.2.2. Renaming a URL Document

i) Select a linked URL document.

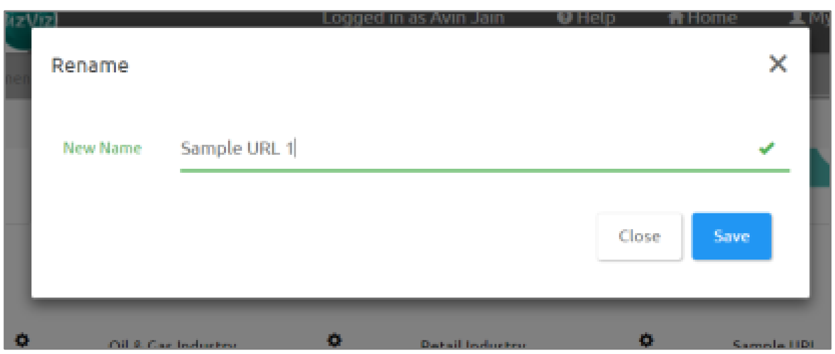
ii) Click the '**Settings**' icon for options.

iii) Select '**Rename**'.

iv) A pop-up window will appear.

v) Enter a New Name for the URL document.

vi) Click '**Save**'.



vii) The URL document will be renamed.

8.2.3. Deleting a URL Document

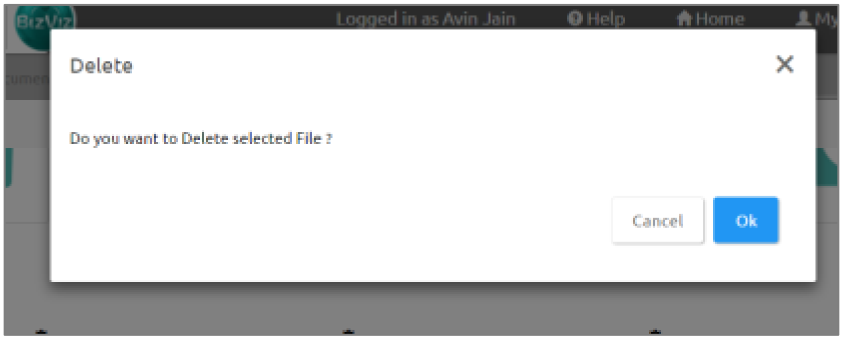
i) Select a linked URL document.

ii) Click the '**Settings**' icon for options.

iii) Select '**Delete**'.

iv) A pop-up window will appear to confirm deletion.

v) Click '**Ok**'.



vi) The selected URL file will be removed.

Note: Delete option is not available for the link URL created or shared as the Public Documents.

8.2.4. Copying a URL Document

It is possible to copy a link URL and paste it to a different place.

i) Select a linked URL document.

ii) Click the '**Settings**' icon for options.

iii) Select '**Copy**'.

iv) Select another folder and click the '**Settings**' icon.
Or

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

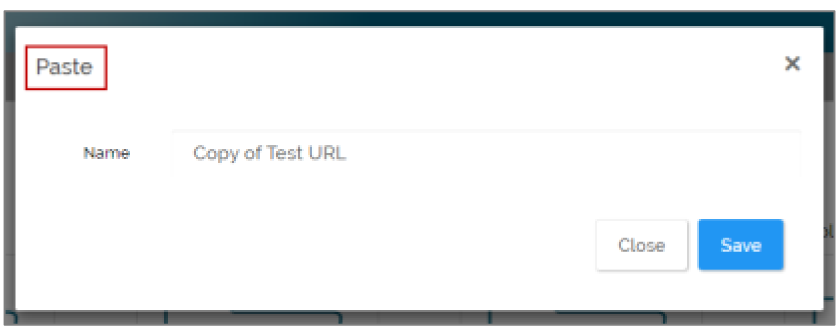
vi) A context menu will appear with the '**Paste**' option.

vii) Select '**Paste**'.

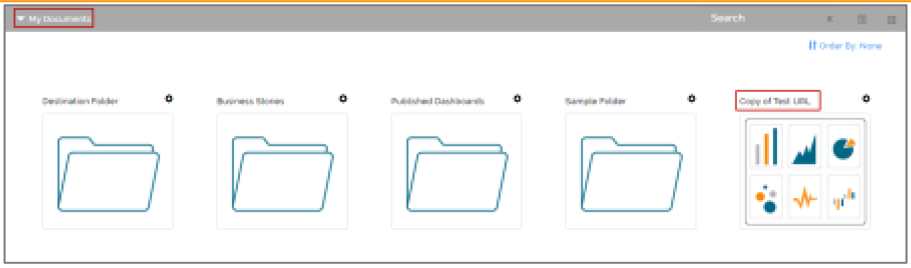
viii) A pop-up window will appear.

ix) The **Name** mentioned in the pop-up window shows prefix '**Copy of-**' before the original name of the folder (E.g. Sample URL 1 will have a new name *Copy of Sample URL 1*).

x) Click '**Save**'.



xi) A pop-up message will appear to assure that the copied link URL has been copied with a different name.



8.2.5. Adding/Removing a URL Document to/from Favorites)

Users can add a URL document to or remove it from ‘**Favorites**’.

i) Select a linked URL document.

ii) Click the ‘**Settings**’ icon for options.

iii) Select ‘**Add to Favorites**’.

iv) A pop-up window will appear with a message, “**URL added to Favorite**”.

v) The selected link URL will be added to ‘**Favorites**’.

vi) Open ‘**Favorites**’.

vii) Navigate to the link URL you wish to remove from ‘**Favorites**’.

viii) Click on the ‘**Remove**’ button.

ix) A pop-up window will appear with a message, “**Document removed successfully!**”.

x) The URL file will be removed from ‘**Favorites**’.

8.2.6. Properties

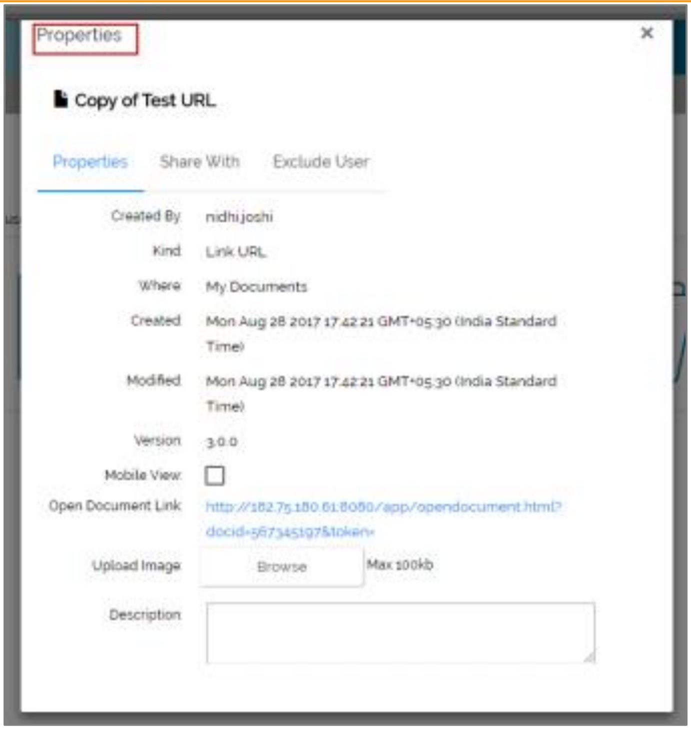
i) Select a linked URL document.

ii) Click the ‘**Settings**’ icon for options.

iii) Select ‘**Properties**’.

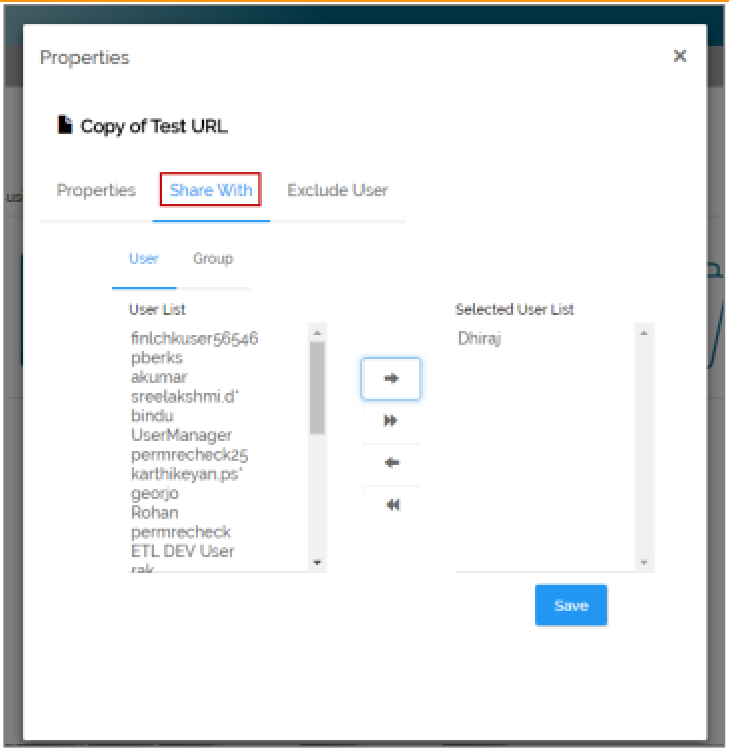
iv) A pop-up window will appear with 3 options.

a. **Properties:** Properties of the linked URL documents will be displayed.



a. **Share With:** The linked URL document will be shared with the selected user or user group.

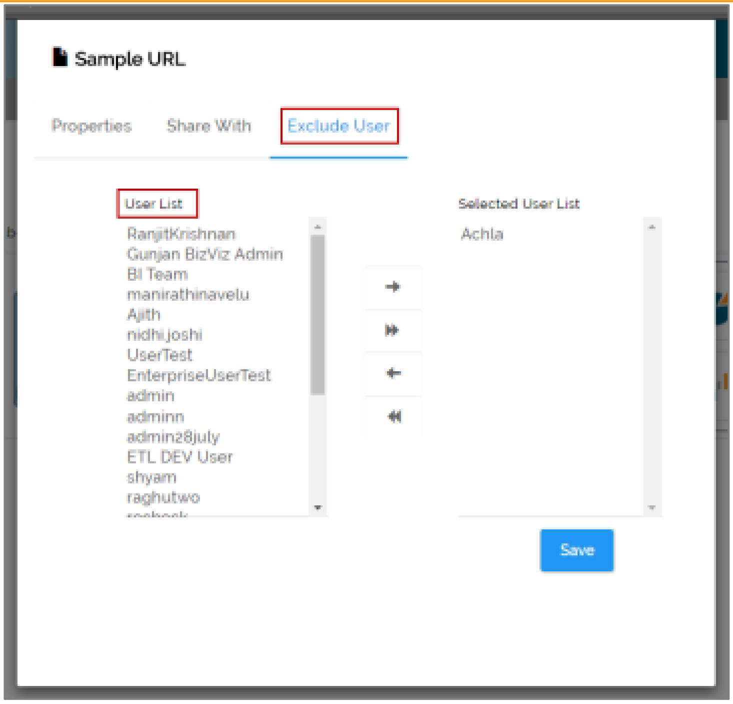
1. Select '**Share With**' on the Properties pop-up screen.
2. Select a user or group from either the **'User List'** or **'Group List'.**
3. Move the selected user or group to the '**Selected User List**' or '**Selected Group List**' using the arrows.
4. Click '**Save**'.



5. The linked URL document will be shared with the selected user or selected user group.

Note: If a URL file is shared using this option, then it will open a view only copy for the selected user or selected user group.

b. **Exclude User:** The selected user will not be able to access the linked URL file.
   1. Select **'Exclude User'** on the Properties pop-up screen.
   2. Select and move a user from **'User List'** to **'Selected User List'** using the arrows.
   3. Click **'Save'.**



4. The selected user will be unable to access the linked URL document.

8.2.7. Moving a URL File

i) Select a linked URL document.

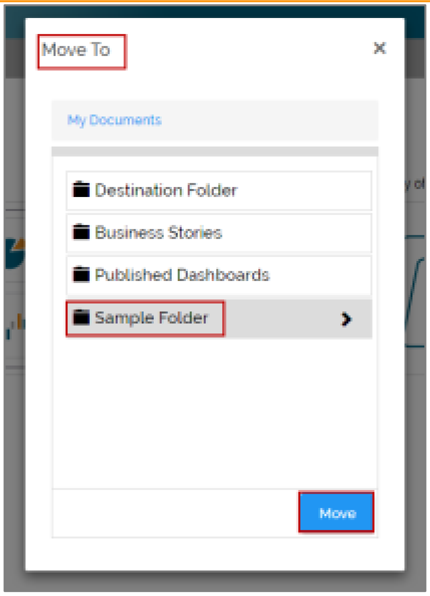
ii) Click the '**Settings**' icon for options.

iii) Select '**Move To**'.

iv) A new pop-up window will appear displaying the available folders.

v) Select a folder from the pop-up window.

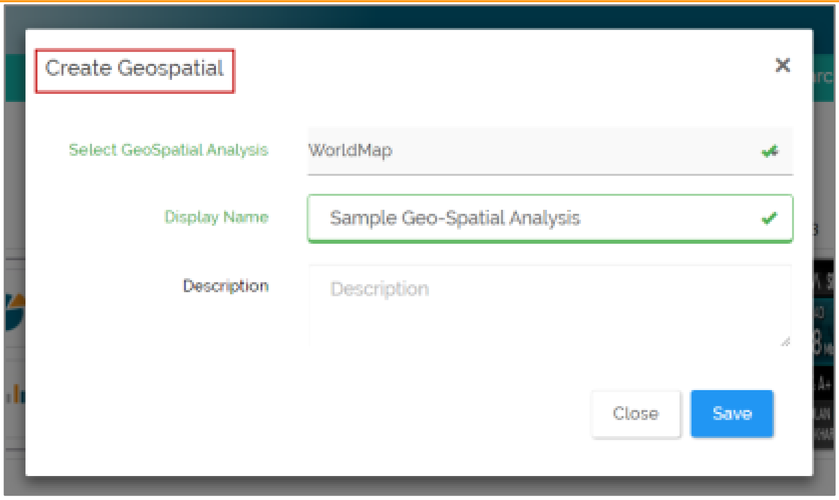
vi) Click '**Move**'.



vii) A success message will appear.
viii) The desired URL will be moved to the selected space.

8.3. Creating a Geospatial

i) Navigate to the platform home page.
ii) Open **'My Documents'** or **'Public Documents'**.
iii) Right-click anywhere on the My Documents or Public Documents.
iv) A context menu opens.
v) Select **'Create Geospatial'**.
vi) A pop-up window will appear.
vii) Fill in the following information:
   a. **Select Geospatial Analysis**: Select an option from the drop-down menu
   b. **Display Name**: Enter a geospatial name
   c. **Description**: Describe the Geospatial (optional)
viii) Click **'Save'**.

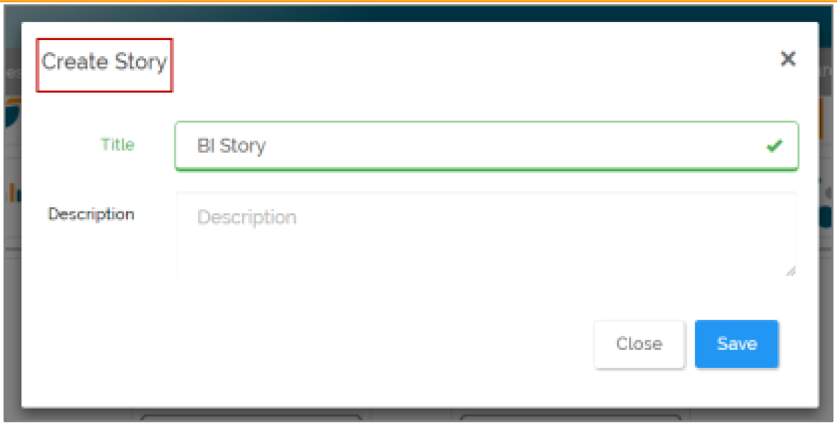


ix) The Geospatial will be created.

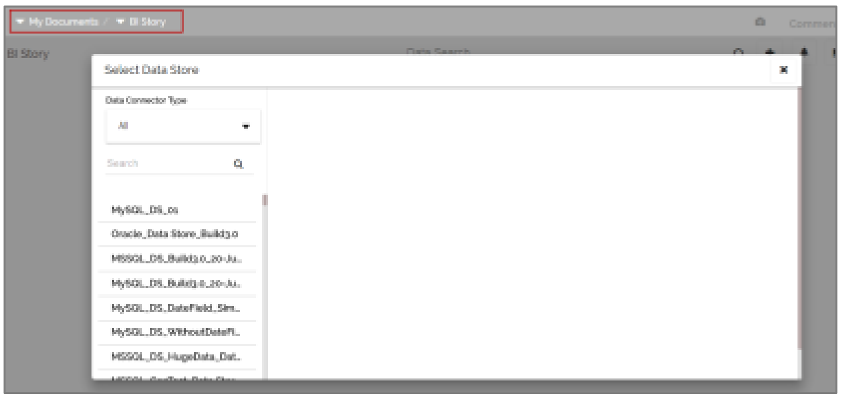
Note: Please refer to the Geospatial User Guide for more details on Geospatial.

8.4. Creating a Story

i) Navigate to the platform home page.
ii) Open '**My Documents**' or '**Public Documents**'.
iii) Right-click anywhere on the My Documents or Public Documents.
iv) A context menu opens.
v) Select '**Create Story**'.
vi) A pop-up window will appear.
vii) Fill in the following information:
   a. **Title**: Enter a title for the story document.
   b. **Description**: Describe the story document (optional).
viii) Click '**Save**'.



ix) The story document will be created and users will be redirected to the following page.

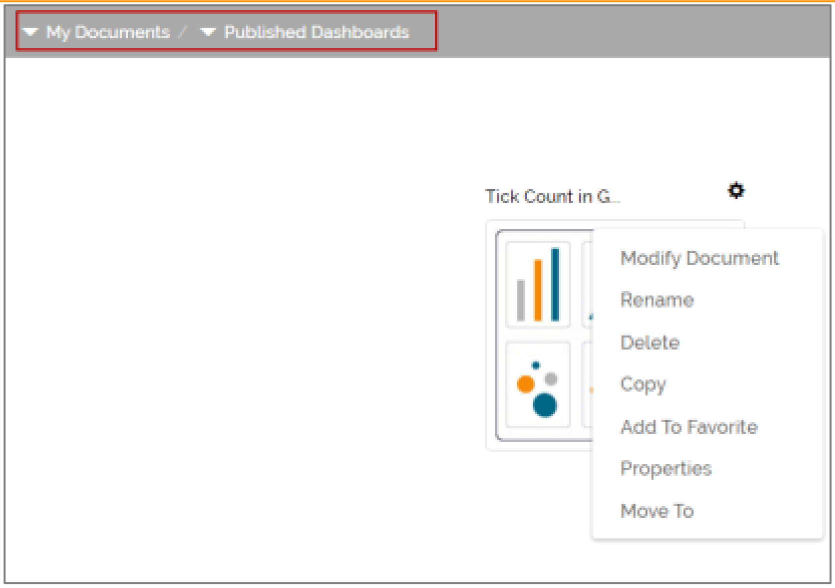


Note: Please refer to the Business Story (Self-Service BI) User Guide for more details on the Story option.

8.5. Published Dashboard under the BizViz Platform

The user can publish various analytics dashboards on the BizViz Platform home page. These dashboards are available on '**My Documents**' or '**Public Documents**'.

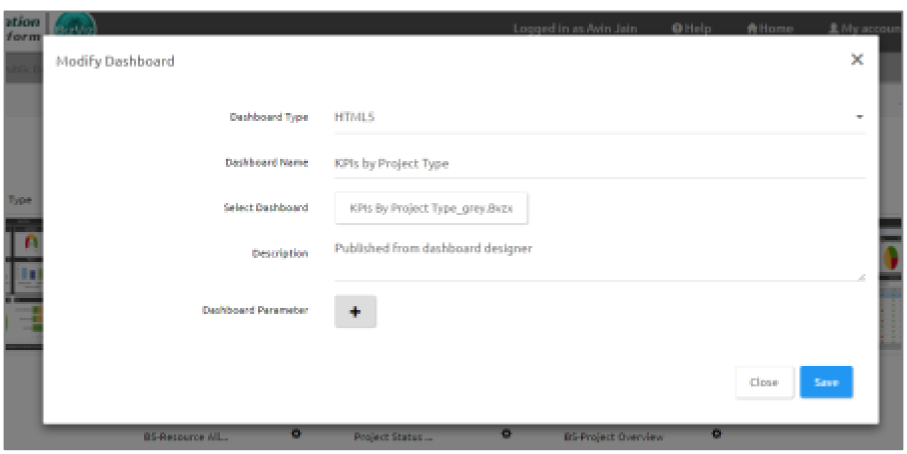
- **Options Assigned to a Dashboard**
  - i) Navigate to the platform home page.
  - ii) Open '**My Documents**' or '**Public Documents**'.
  - iii) Select a published dashboard on the My Documents or Public Documents.
  - iv) Click the '**Settings**' icon.
  - v) A context menu opens with options.



8.5.1. Modifying a Dashboard

This section explains step by step process to modify an existing dashboard.

i) Select a dashboard.
ii) Click the '**Settings**' icon for options.
iii) Select '**Modify Document**'.
iv) A pop-up window will appear.
v) Fill in the following information:
   a. **Dashboard Type:** Enter the dashboard type
   b. **Dashboard Name: Enter name for the dashboard**
   c. **Select Dashboard:** Upload a dashboard from the local drive (The dashboard should be in a BVZ file format)
   d. **Description:** Describe the dashboard (optional)
   e. **Dashboard Parameter:**
      i. Click the '**Add**' button to add a new dashboard parameter
      ii. Click the '**Close**' button to remove the added dashboard parameter
vi) Click '**Save**'.

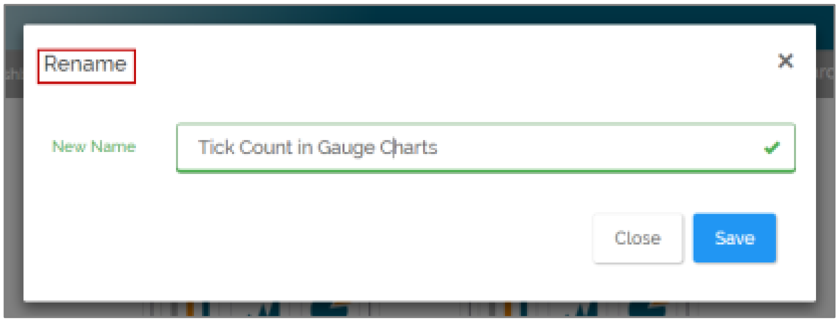


vii) A pop-up message will appear to assure that the required data has been updated.

8.5.2. Renaming a Dashboard

Administrators can change the name of an existing dashboard.

i) Select a dashboard.
ii) Click the '**Settings**' icon for options.
iii) Select '**Rename**'.
iv) A pop-up window will appear.
v) Enter a new name for the dashboard.
vi) Click '**Save**'.

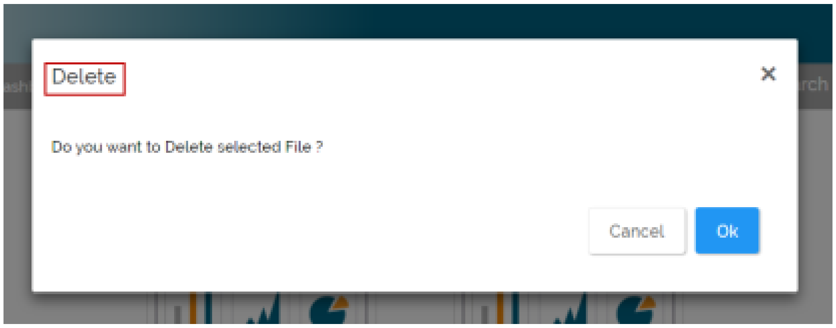


vii) A pop-up message will appear to assure that the document has been renamed.

8.5.3. Deleting a Dashboard

Administrators can delete a dashboard by following the given steps:

i) Select a dashboard.
ii) Click the '**Settings**' icon for options.
iii) Select '**Delete**'.
iv) A new window pops-up to confirm deletion.
v) Click '**Ok**'.



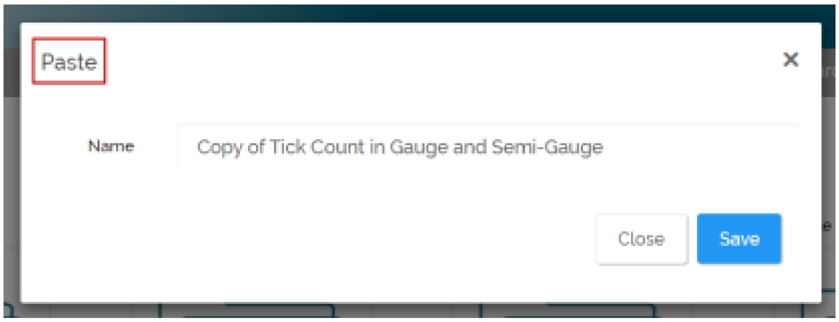
vi) The selected dashboard will be deleted.

8.5.4. Copying and Moving a Dashboard

Administrators can copy an existing dashboard and paste it at any chosen place within My Documents or Public Documents of the platform.

i) Select a dashboard.

ii) Click the ‘**Settings**’ icon for options.
iii) Select ‘**Copy**’.
iv) Select another folder and click the ‘**Settings**’ icon.
Or
v) Navigate to ‘**My Documents**’ or ‘**Public Documents**’ and right-click anywhere.
vi) A context menu will appear with the ‘**Paste**’ option.
vii) Select ‘**Paste**’.
viii) A pop-up window will appear.
ix) The **Name** mentioned in the pop-up window shows prefix ‘**Copy of-**’ before the original name of the dashboard (E.g. *Sample Dashboard* will have a new name *Copy of Sample Dashboard*).
i) Click ‘**Save**’.

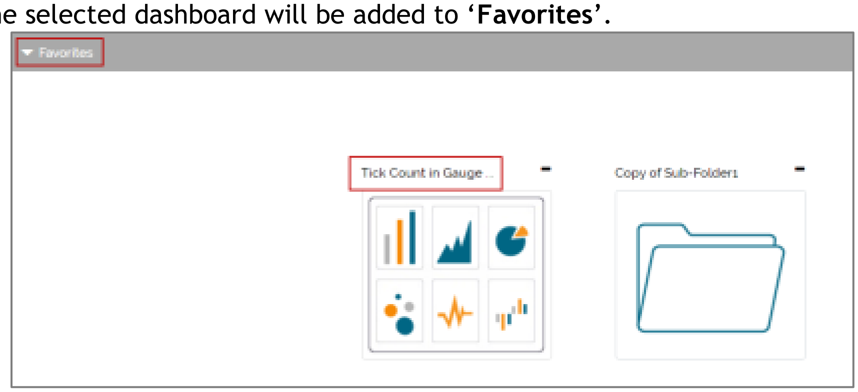


ii) The selected dashboard will be copied with a different name.

8.5.5. Adding/Removing a Dashboard to/from Favorites)

Administrators can add a dashboard to or remove it from ‘**Favorites**’.

i) Select a dashboard.
ii) Click the ‘**Settings**’ icon for options.
iii) Select ‘**Add to Favorites**’.
iv) A pop-up window will appear with a message, “**Document added to favorites!**”.
v) The selected dashboard will be added to ‘**Favorites**’.



vi) Open ‘**Favorites**’.
vii) Select the dashboard you wish to remove from ‘**Favorites**’.
viii) Click on the ‘**Remove**’ button.
ix) A pop-up window will appear with a message, “**Document removed successfully!**”.
x) The dashboard will be removed from ‘**Favorites**’.

8.5.6. Properties

This section explains properties of a selected dashboard.

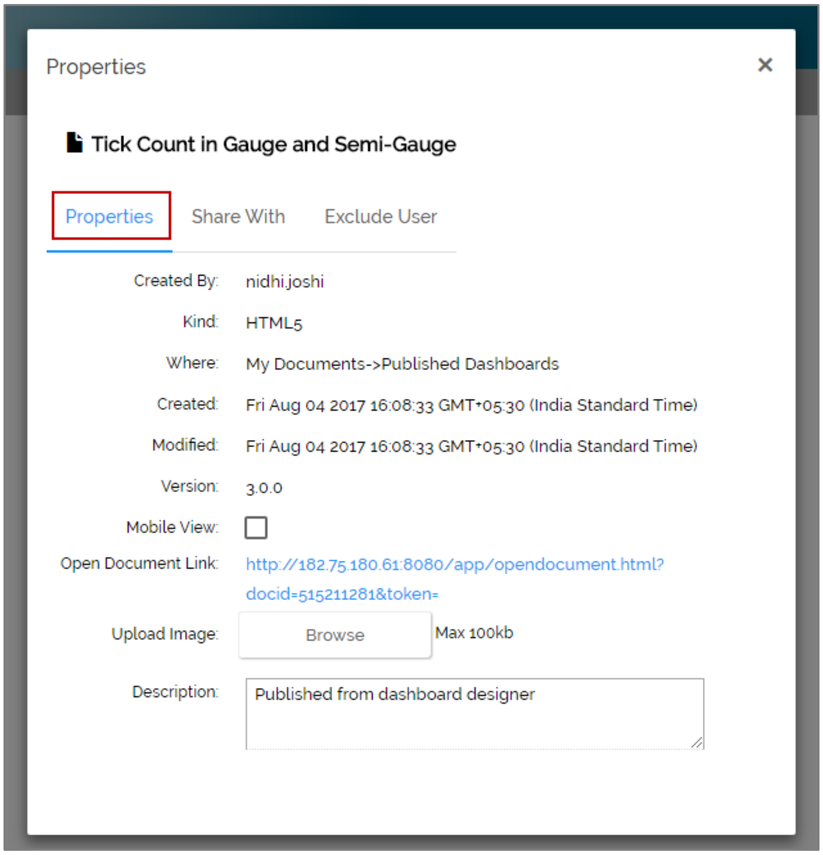
i) Select a dashboard.

ii) Click the '**Settings**' icon for options.

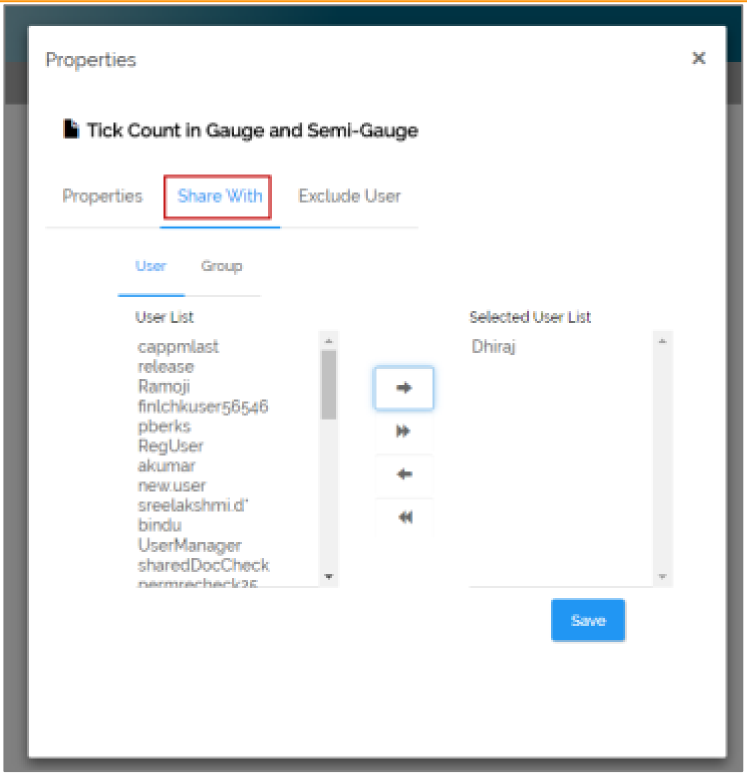
iii) Select '**Properties**'.

iv) A new window will appear with 4 options.

- **Properties:** Dashboard properties will be displayed.



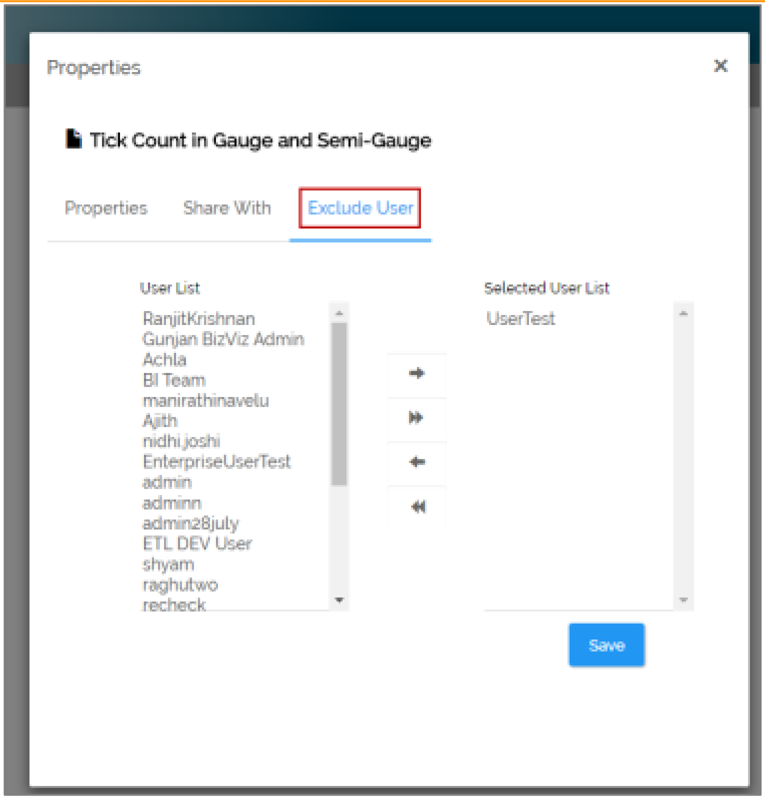
- **Share With:** The dashboard will be shared with the selected user or user group.
    1. Select '**Share With**' on the Properties pop-up screen.
    2. Select a user or group from either the '**User List**' or '**Group List**'.
    3. Move the selected user or group to the '**Selected User List**' or '**Selected Group List**' using the arrows.
    4. Click '**Save**'.



5. The dashboard will be shared with the selected user or selected user group.

Note: If a dashboard document is shared using this option, then the selected users and user groups will receive a view only copy.

- **Exclude User:** The selected user will not be able to access the dashboard.
    1. Select '**Exclude User'** on the Properties pop-up screen.
    2. Select and move users from '**User List**' to '**Selected User List**' using the arrows.
    3. Click '**Save**'.



a. The selected user will be unable to access the dashboard.

8.5.7. Moving a Dashboard

Administrators can move a dashboard from one folder or document space (E.g. 'My Documents') to another folder or document space.

i) Select a dashboard.

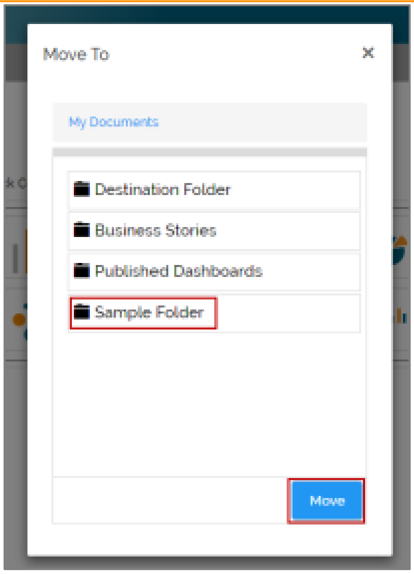
ii) Click the '**Settings**'  icon for options.

iii) Select '**Move To**'.

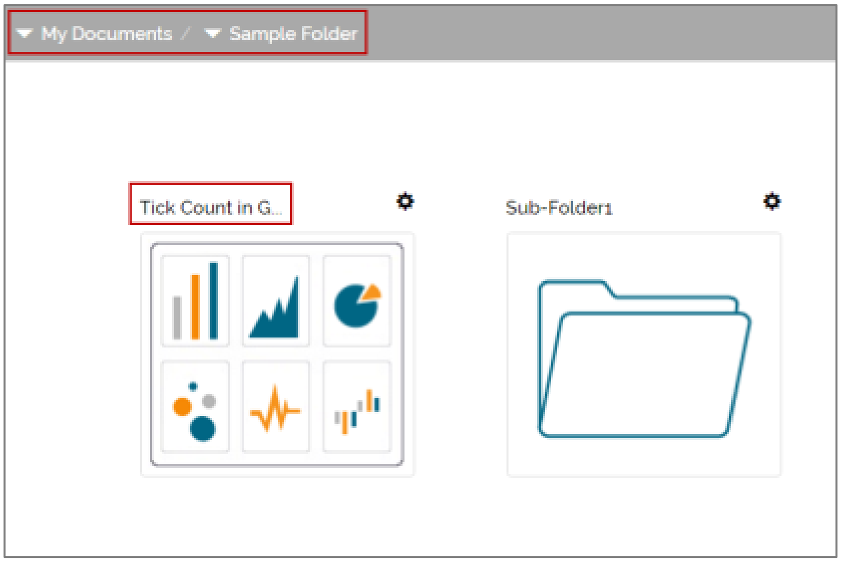
iv) A pop-up window will appear displaying the available folders.

v) Select a folder from the pop-up window.

vi) Click '**Move**'.

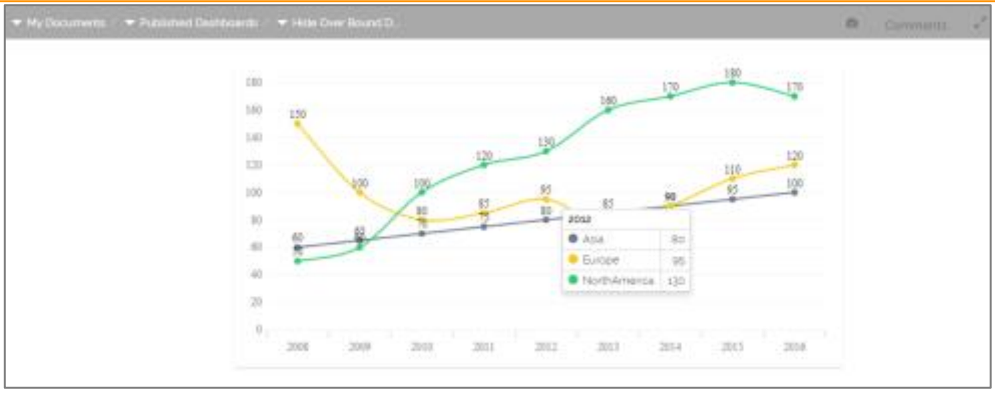


vii) A success message will appear.
viii) The dashboard will be moved to the selected space.



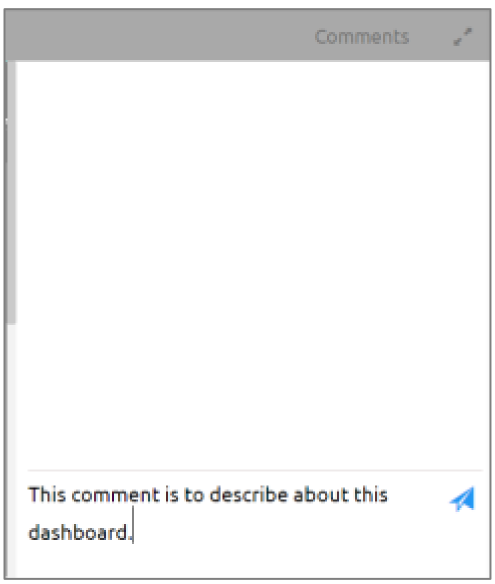
Note: To view a dashboard, use a click on the selected dashboard.

a. **The following options will be provided on a dashboard screen to facilitate users:**
   - **Capture Image Icon**: Captures the dashboard image and redirects to save it.
   - **Comments:** Explain about the dashboard or insert feedback comments.
   - **Full Screen/ Reduce Size**: View the dashboard in full screen or reduce the dashboard screen size.

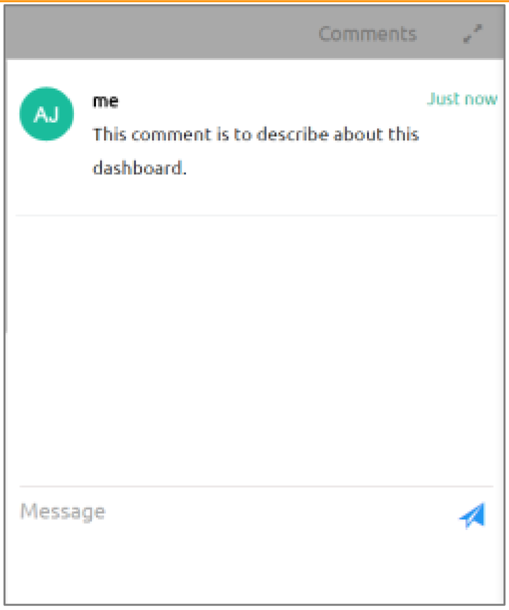


b. Steps to Insert a Comment

i) Click ‘**Comments**’ on the View Document screen.
ii) A new window will open below.
iii) Space to insert a message can be seen at the end of the window.
iv) Type a comment in the given ‘**Message**’ space.
v) Click ‘**Send**’.



vi) The comment will be displayed in the ‘**Comments**’ window.



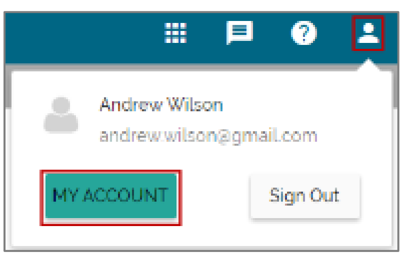
Note:

a. Comments can be entered by all the users who have access to the dashboard document.
b. Inserted comments on the dashboard screen display record of Author's initial (E.g. AJ) and time (when the comment was inserted).

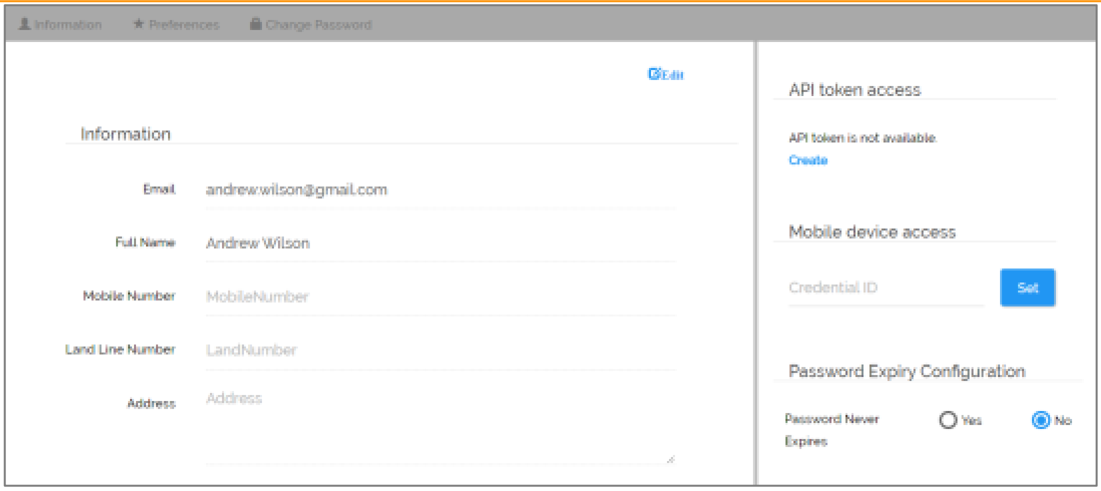
9. My Account

This section covers 3 options to manage settings for a user account.

i) Navigate to the Platform home page.
ii) Click the '**User**' icon.
iii) Logged in details of the user will be displayed in a window.
iv) Click '**My Account**'.



v) Users will be directed to the following window:



Note: Information option window will be displayed by default.

9.1. Information

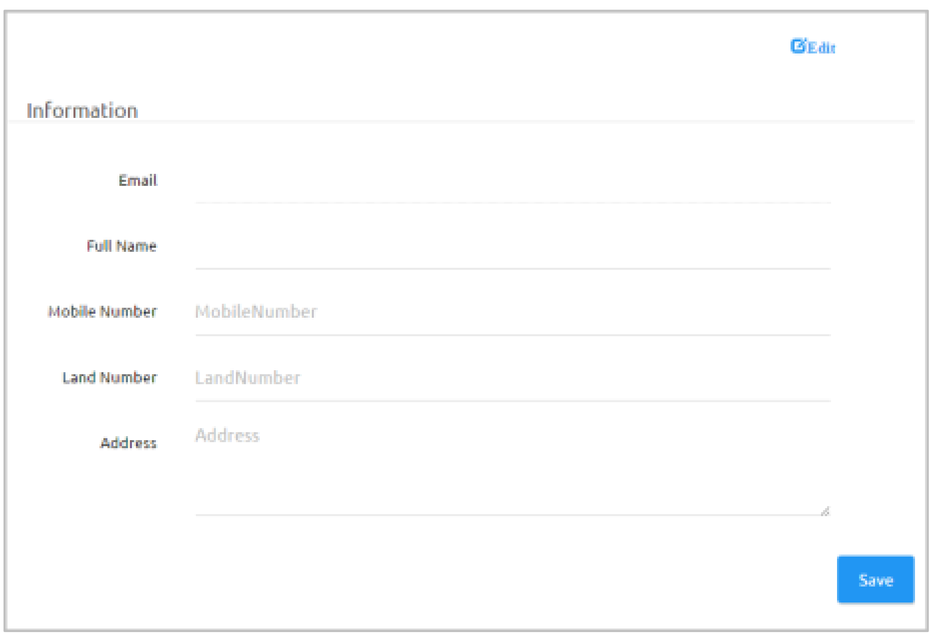
This module displays personal information about the user.

i) Click '**Information**' on the My Account menu row.

ii) The following details will be displayed:

- Email
- Full Name
- Mobile Number
- Land Number
- Address

iii) Click '**Save**'.



iv) The user information will be saved.

Note:

a. It is mandatory to click ‘**Edit**’ to enter the user information in the given fields.
b. Use ‘**Edit**’ option to modify/change the user information.

Steps to edit the Information:
Click ‘**Edit**’ -> Modify/ Change the details -> Click ‘**Save**’

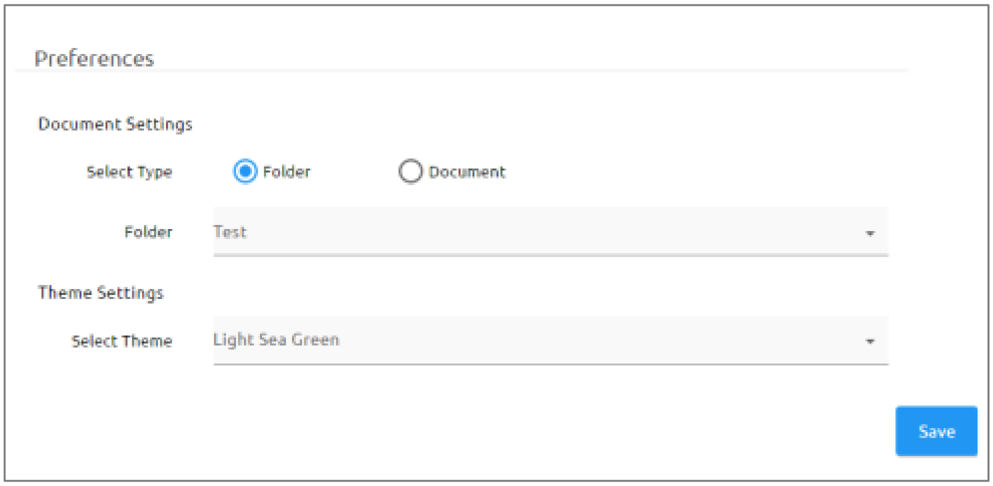
c. Except email address, all the other profile information can be modified from the ‘**Information**’ module.

9.2. Preferences

The Administrator can change the preference settings of the users using this module from the left side of the pane.

Follow the below-given steps to change preference settings

i) Click ‘**Preferences**’ on the My Account menu row.
ii) The ‘**Document Settings**’ options will be displayed.
iii) Use a radio button to select either of the choices out of: ‘**Folder**’ or ‘**Document**’.
iv) As per the selected choice, a drop-down menu will be launched.
v) Select a file or document from the respective drop-down menu.
vi) Select a theme from the drop-down menu.
vii) Click ‘**Save**’
viii) A pop-up message will appear to assure that the preferences have been updated.

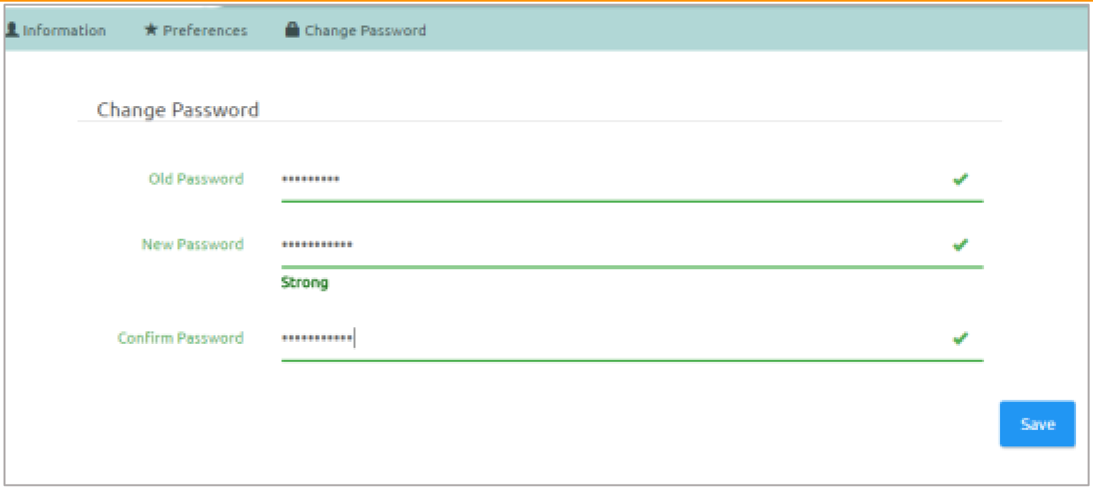


Note: Folders and documents will be displayed to the users as per the set preferences by the administrator.

9.3. Changing Password

User can reset the password for his account using this segment.

i) Click ‘**Change Password’** on the My Account menu row.
ii) A new page opens.
iii) Enter ‘**Old Password**’, ‘**New Password**’, and ‘**Confirm Password**’ (the newly set password).
iv) Click ‘**Save**’



v) The password will be changed.

9.4. Other Related Options

The API Token and Mobile Device access codes are displayed on the right pane of the '**My Account**' page. The Password Configuration can be accessed via the same page.

a. API Token

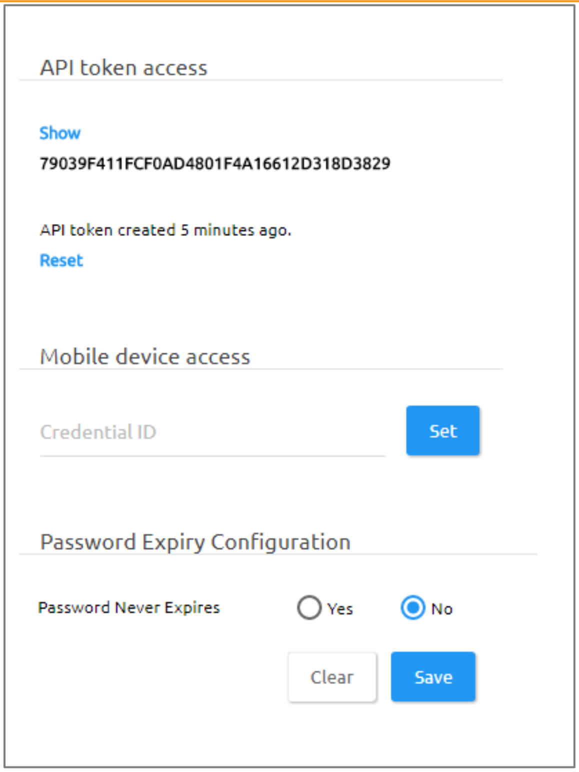
- It is an authentication token that is used to expose document as an open document.
- API token can be accessed and reset using the '**My Account**' option.

b. Mobile Device Access

- Mobile device access is secured with unique code and generates a new code as per the set time.
- Users need to set the credentials when first using this feature; thereafter the feature can be easily availed from the iOS App Store.

c. Password Expiry Configuration

- Password expiry limit can be configured via this option.
- Users need to select either of the choices for the '**Password Never Expires**' option out of: '**Yes**' or '**No**' and click '**Save**'.



10. Securing Platform: Authentication

BizViz Platform is provided with some authentication features to keep it secure all the time.

10.1. Enterprise

Enterprise authentication is the default authentication method for the BizViz platform; it is automatically enabled when you first install the system - it cannot be disabled. The BizViz platform maintains user and group-specific information within its database while adding or managing users and groups. Use the system default Enterprise authentication if you prefer to create distinct accounts and groups for use with the BizViz platform, or if you have not already set up a hierarchy of users and groups in a third-party directory server. You do not have to configure or enable Enterprise authentication. However, users can opt for another authentication option to meet their organization's security requirements.

10.2. Windows AD

The Windows AD security enables you to map user accounts and groups from your AD 2008 user database to the BizViz platform. It also enables the system to verify all logged on requests that specify AD Authentication. Users are authenticated against the AD user database and have their membership in a mapped AD group verified before the BizViz platform grants them an active session. You can use the plug-in to configure updates for the imported AD groups.

10.3. Clarity

Security in CA Clarity PPM has two aspects: i) securing the application and, ii) securing its data. The security mechanism and control are the same for both.

a. **Securing the Application**: It verifies that the correct users have access to the

appropriate application functionality. User access and capabilities are controlled by this type of clarity security.
E.g. Administrator is provided more rights than an end user.

b. **Securing the Application Data:** It verifies that resources have access only to the assigned data.
E.g. everybody should be able to see the platform page, but with their assigned projects and functionalities.

Note: The authentication options can be changed through the administration module.

11. Signing Out

The following steps describe how to log out from the BizViz Platform.

i) Click the ‘**User**’ icon on the Platform home page.
ii) A menu appears with the logged in user details.
iii) Click ‘**Sign Out**’.
iv) Users will be successfully logged out from the **BizViz Platform**.

Note: Clicking on ‘**Sign Out**’ will redirect the user back to the ‘**Login**’ page of the BizViz platform.

