How to Guide

Auto Date Drill

Contents

1. Document Purpose

The purpose of this document is to guide users on how to define and use the auto date drill functionality. It is recommended that users follow the step by step process given below.
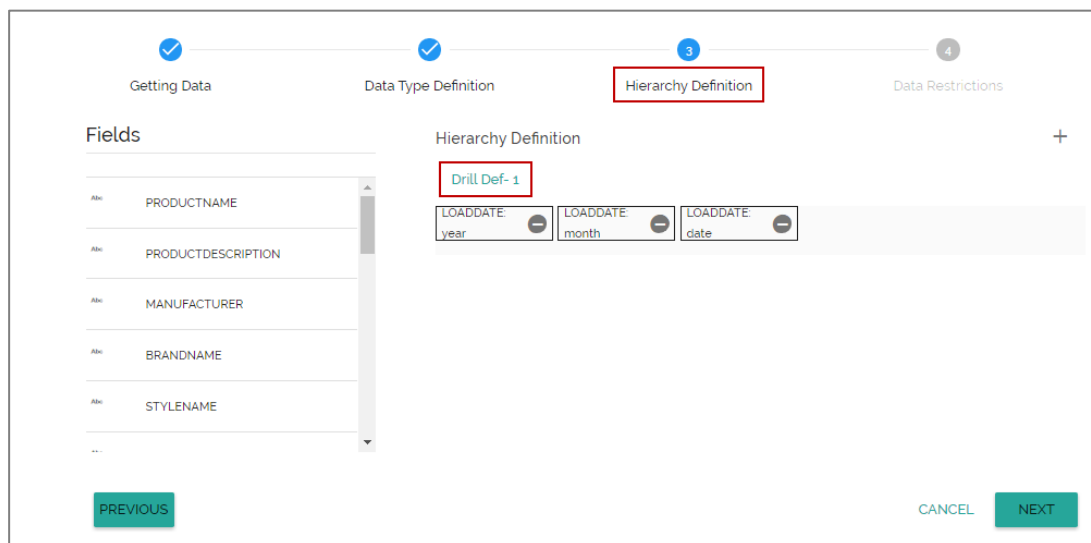
2. Pre-requisites

- o Browser that supports HTML5
- o Operating System: Windows 7
- o Basic understanding of the BizViz Server
- o Permission to access and use Data Center Module
- o Basic understanding of how to access, create, and modify Data Stores under the Data Center module of the BDB Platform.
- o Basic understanding of the Business Story workflow.
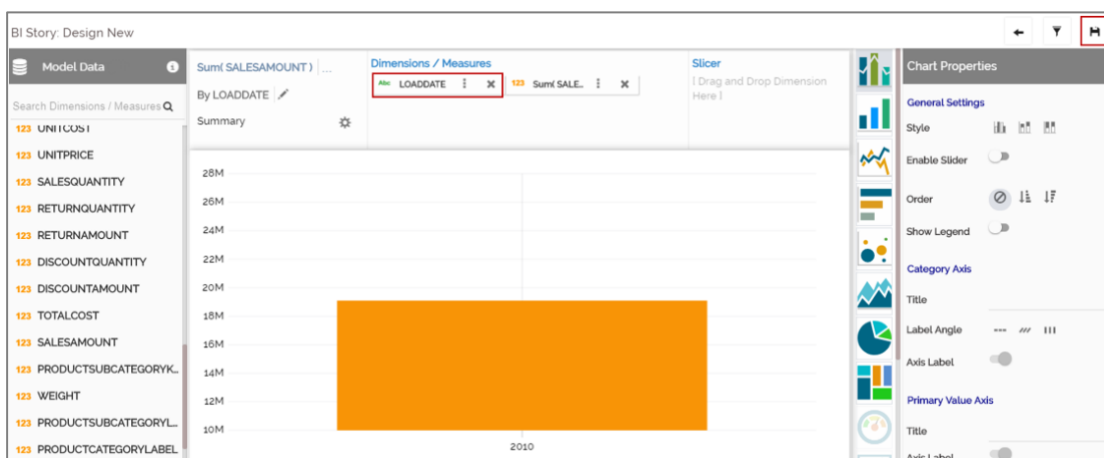
3. Auto Date Drill: Step-by-Step Process

The Auto Date Drill allows users to drill down in the time values of a saved view on story board of a Business Story.

Users must define hierarchical pattern for the time values in a data store via the '**Hierarchy Definition**' option of a Data Store.
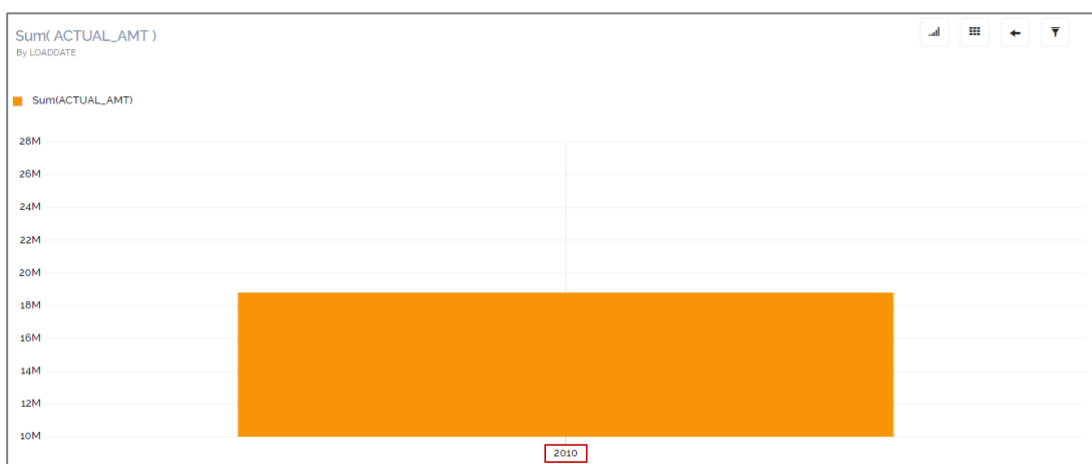
i)   Navigate to the '**Hierarchy Definition**' tab (while creating a data store).
ii) Drag and drop a time dimension into the '**Drill Def**' box to configure the drill path.
iii) The dragged time dimension will split into three granularities (E.g. Year>Month>Date)
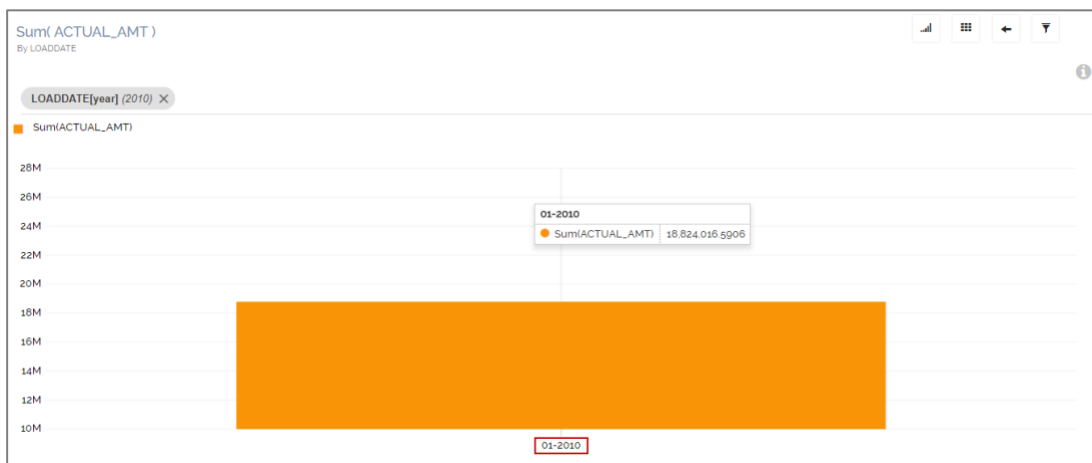iv) Click '**Next**'.
v)   Create a data store successfully.

vi) Select the data store with the defined drill path to create a new view.
vii) Select the dimension for which the drill path has been defined and drag to create a view.
viii) Click '**Save**' option 💾 to save the view on the Storyboard.

ix) Access the saved view on the storyboard by double clicks on it.

x) Users will be directed to the 'Analyse' window displaying time in the highest-level granularity (E.g. Year).

xi) Click on a year to display the monthly data.

xii)   Click on a month to display the daily data.

Note: Users can define the dimension values and use drill-down functionality for a saved view on the Storyboard.

4.   Signing Out

The following steps describe how to sign 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: By Clicking the '**Sign Out**' option users will be redirected to the '**Login**' page of the BizViz platform.