

Auto Date Drill

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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.

Pre-requisites 2.

- Browser that supports HTML5 0
- Operating System: Windows 7
- Basic understanding of the BizViz Server
- Permission to access and use Data Center Module
- Basic understanding of how to access, create, and modify Data Stores under the Data Center module of the BDB Platform.
- Basic understanding of the Business Story workflow.

Auto Date Drill: Step-by-Step Process 3.

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.

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

Getting Data	Data Type Definition	Hierarchy Definition	
Fields	Hierarchy Defini	tion	
Ame PRODUCTNAME	Drill Def- 1		
Abc PRODUCTDESCRIPTION	year	month date	
Abc MANUFACTURER			
ANI BRANDNAME			
ANI STYLENAME			
41	Ŧ		
PREVIOUS			

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



BI Story: Design New					+ ▼ H
Model Data	Sum(SALESAMOUNT)	Dimensions / Measures Anc LOADDATE : X 123 Sum(SALE_ : X	Slicer I Drag and Drop Dimension Here I	Chart Prop General Set	perties
123 UNITCOST	Summary 🔅			Style	His int Hit
123 UNITPRICE 123 SALESQUANTITY	28M	28M			н ()»
123 RETURNQUANTITY	26M				● 11 IF
123 RETURNAMOUNT 123 DISCOUNTQUANTITY	22M				ds
123 DISCOUNTAMOUNT	20M		_	Title	
123 SALESAMOUNT	16M			Label Angle	/// 111
123 PRODUCTSUBCATEGORYK	14M			Axis Label	
123 PRODUCTSUBCATEGORYL.	12M 10M			Primary Valu	ue Axis
123 PRODUCTCATEGORYLABEL		2010			-

- ix)
- Access the saved view on the storyboard by double clicks on it. Users will be directed to the 'Analyse' window displaying time in the highest-level granularity (E.g. X) Year).

Sum(ACTUAL_AMT) By LOADDATE	.al	 +	Ŧ
Sum(ACTUAL_AMT)			
28M			
26M			
24M			
22M			
20M			
18M			
16M			
14M			
127			
2010			

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

Sum(ACTUAL_AMT) By LOADDATE		.al	===	+	Ŧ	-
LOADDATE[year] (2010) ×						0
Sum(ACTUAL_AMT)						
28M						
26M	01-2010					
24M	Sum(ACTUAL_AMT) 18.824.016.5906					
22M						
20M						
18M						
16M						
14M						
12M						
10M	01-2010					



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 **2** 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.