



User Guide

Business Story R-3.0

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1. About this Guide

1.1. Document History

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

Product Version	Date (Release date)	Description
BizViz Business Story 2.0	February 21 st , 2016	First release of the document
BizViz Business Story 2.1	May 25 th , 2016	Updated document
BizViz Business Story 2.5	November 9 th , 2016	Updated document
BizViz Business Story 2.5.3	March 16 th , 2017	Updated document
BizViz Business Story 3.0	August 31 st , 2017	Updated document
BizViz Business Story 3.0	October 26 st , 2017	Modified Document

Note: Business Story was introduced as an integrated feature to the BDB Platform in the release version 2.0, so the 'Product Version' refers to the Platform Release version.

1.2. Overview

This guide covers:

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

1.3. Target Audience

This document is aimed at business users who use the BizViz Business Story to create their business stories and get deeper insights into their business data.

2. Introducing BizViz Business Story

2.1. Introduction

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

2.2. Prerequisites and Supported Devices

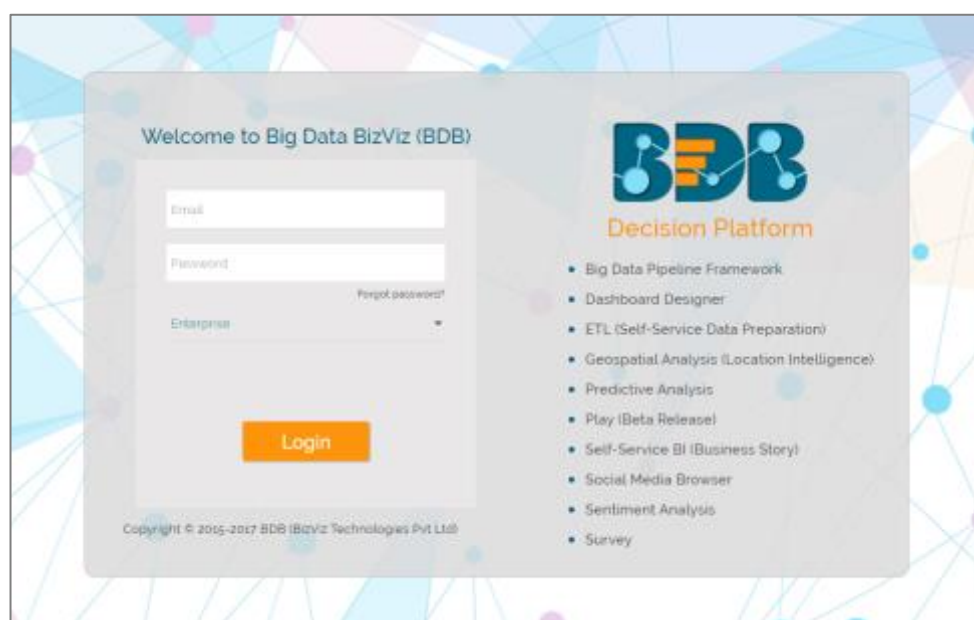
- Browser that supports HTML5
- Operating System: Windows 7
- Basic understanding of the BizViz Server

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

3. Getting Started with BizViz Business Story

This section covers how to access the Business Story on the BizViz Platform.

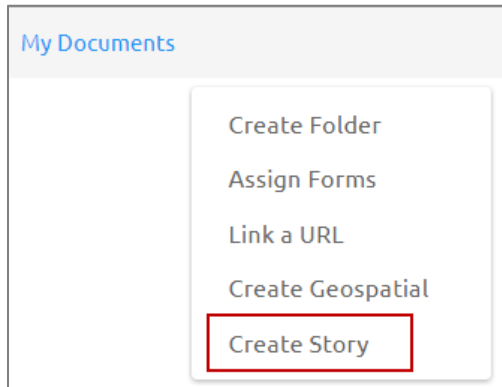
- i) Open BizViz Enterprise Platform Link: <http://apps.bdbbizviz.com/app/>
- ii) Enter your credentials to log in to the platform.
- iii) Click 'Login'



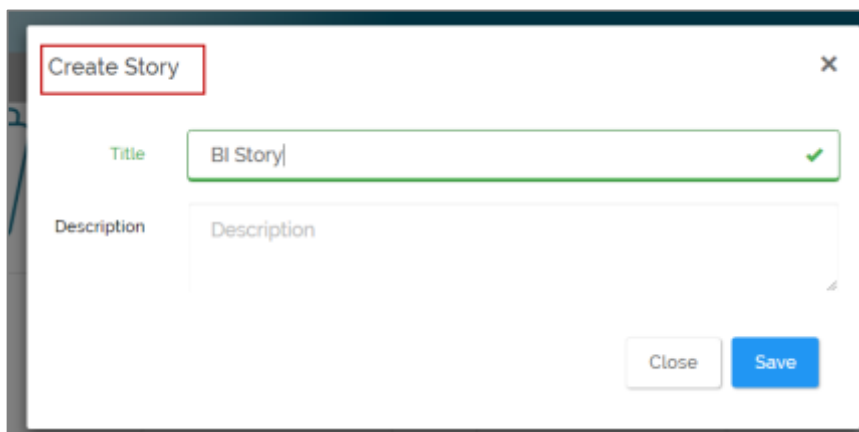
- iv) BizViz Platform home page will open.



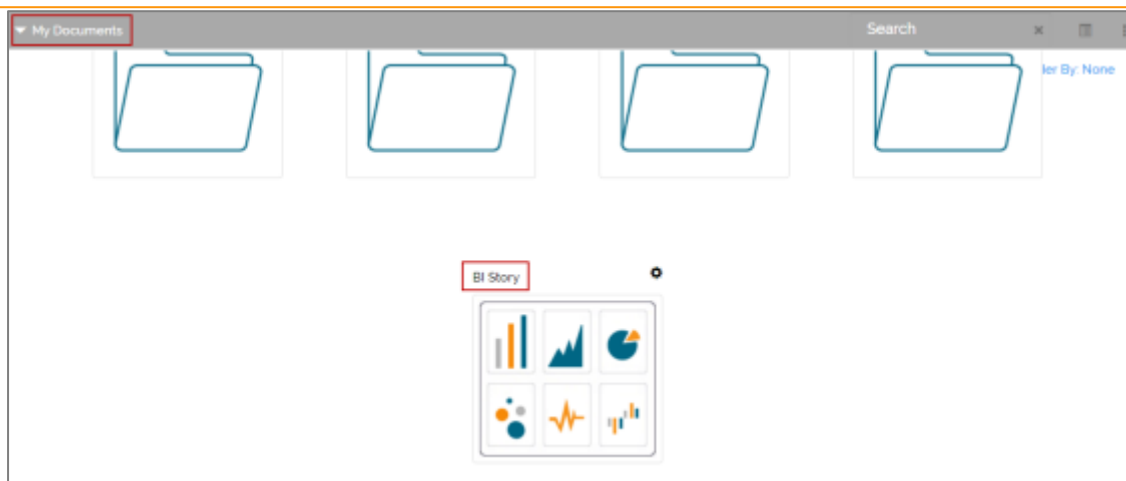
- v) Select **'My Documents'** or **'Public Documents'**
- vi) Use a right click anywhere on **'My Documents'** or **'Public Documents'**
- vii) A context menu opens.
- viii) Select **'Create Story'** option from the context menu.



- ix) A new window pops-up.
- x) Fill in the following information:
 1. **Title:** Enter a title for the story document
 2. **Description:** Describe the story document (optional)
- xi) Click **'Save'**



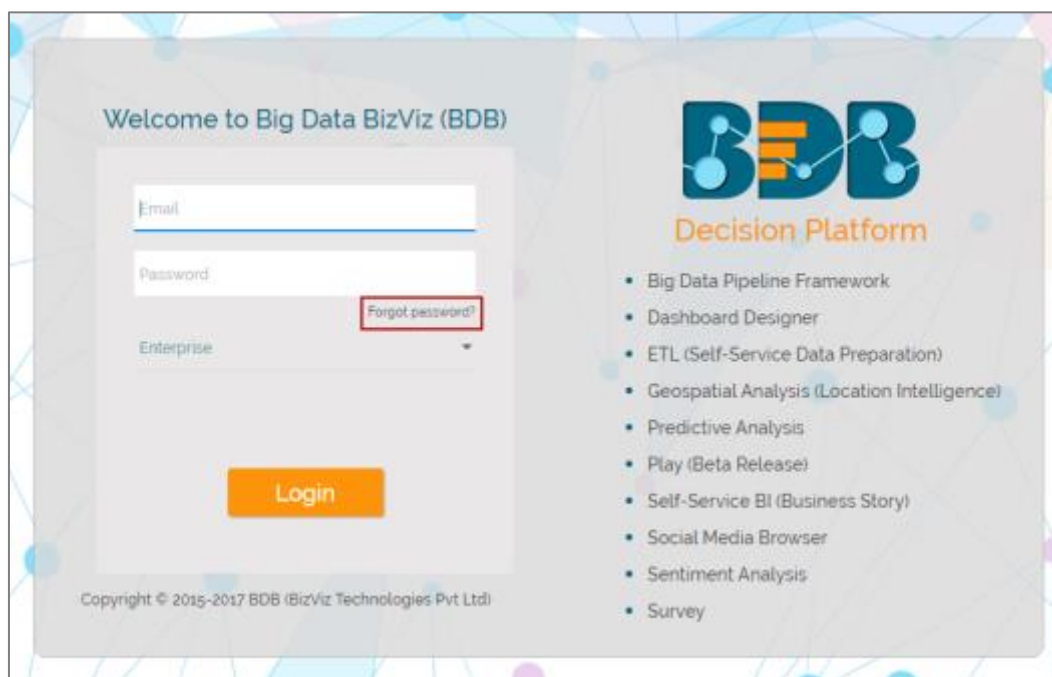
- xii) The story document will be created under the selected document space.



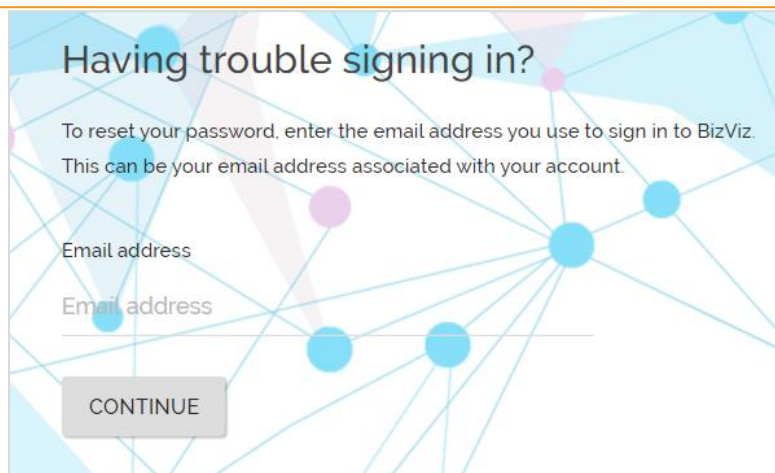
3.1.1. Forgot Password Option

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

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



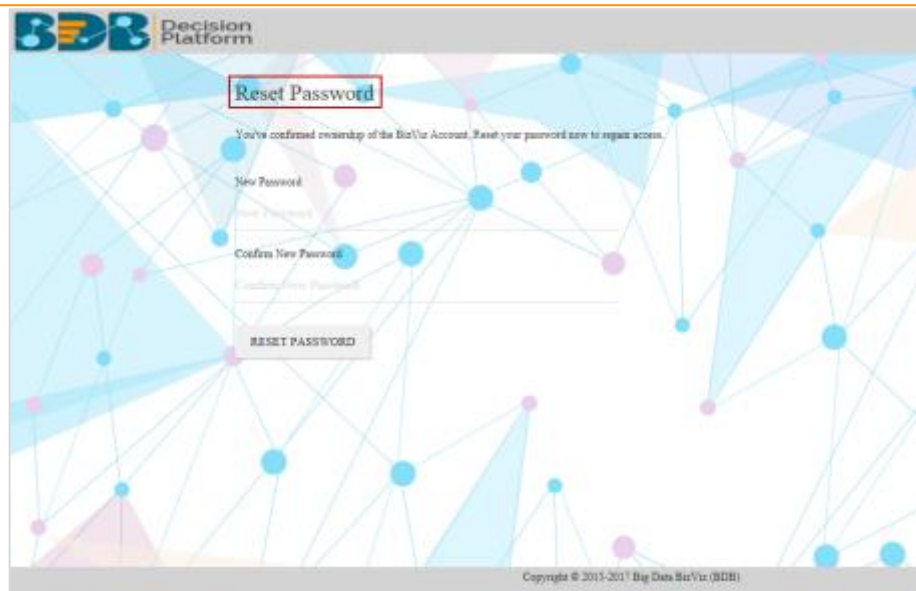
- iii) Users will be redirected to a new window.
- iv) Provide the email id that is registered with BDB to send the reset password link.
- v) Click '**Continue**'



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.
- x) Set a new password.
- xi) Confirm the newly set password.
- xii) Click 'RESET PASSWORD'



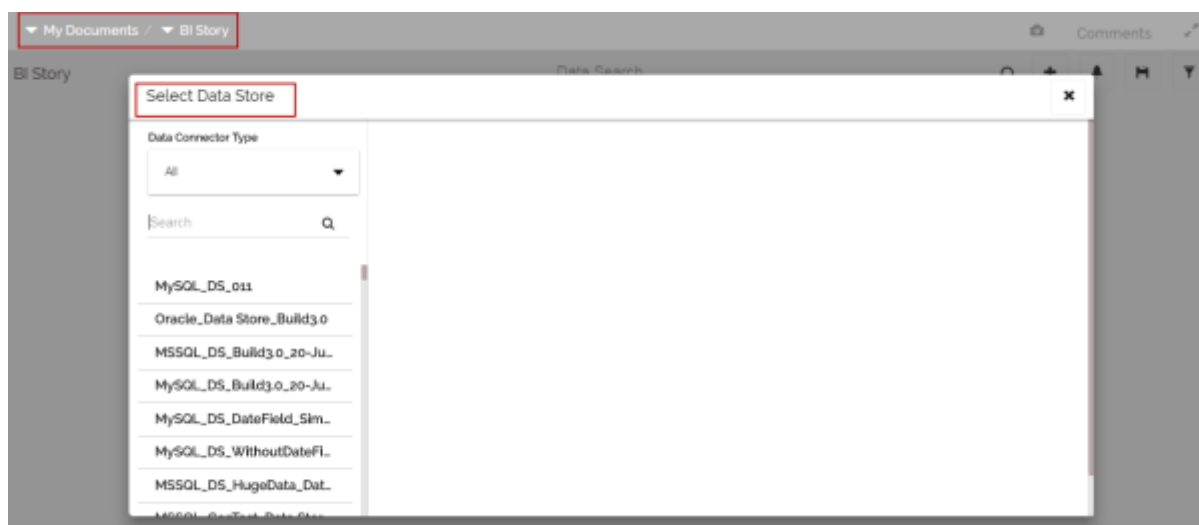
xiii) The password will be successfully reset.

4. Designing a Business Story

4.1. Selecting a Data Source

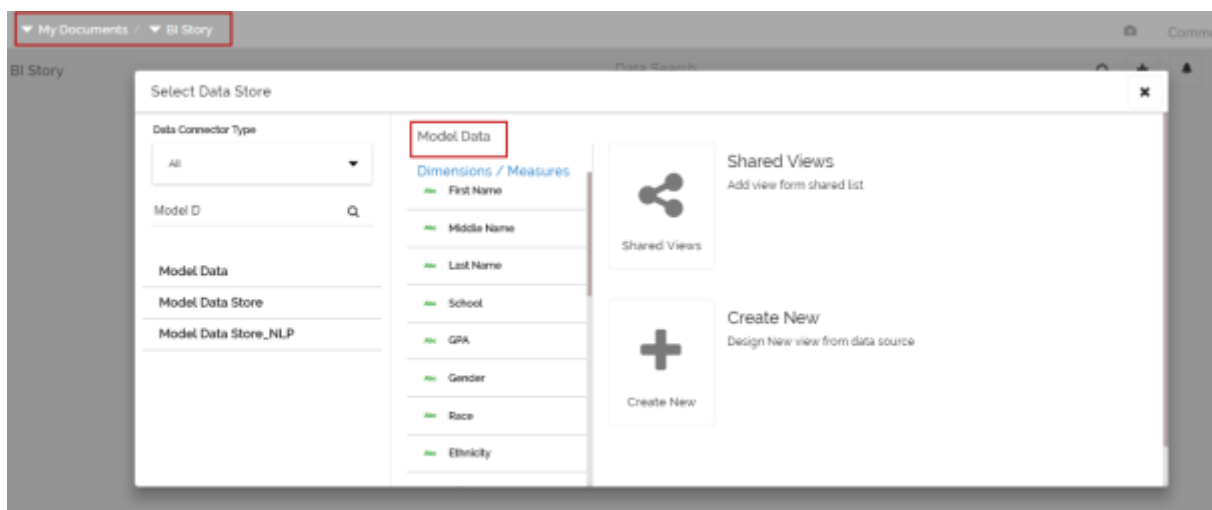
This section explains steps to select a data store to create a business story.

- i) By clicking 'Save' on the 'Create Story' pop-up window, Users will be redirected to select a data store.
 1. Select a 'Data Connector Type' using the filter.
 2. Search a data store using the 'Search' bar.
 3. Select a data source (data store) from the list



- ii) On selecting a data source (data store), the following information will be displayed:
 1. A Dimensions/Measures list for the selected data store.

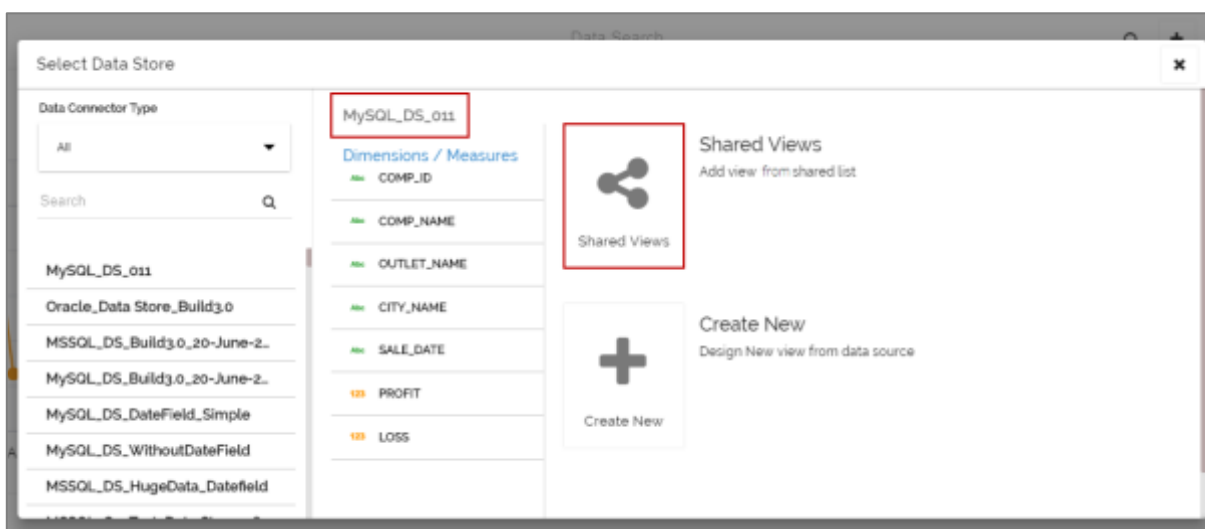
2. 'Shared Views' option to add an existing view on the story board (if any view has been created using the data store).
3. 'Create New' option to create a new view using the selected data store.



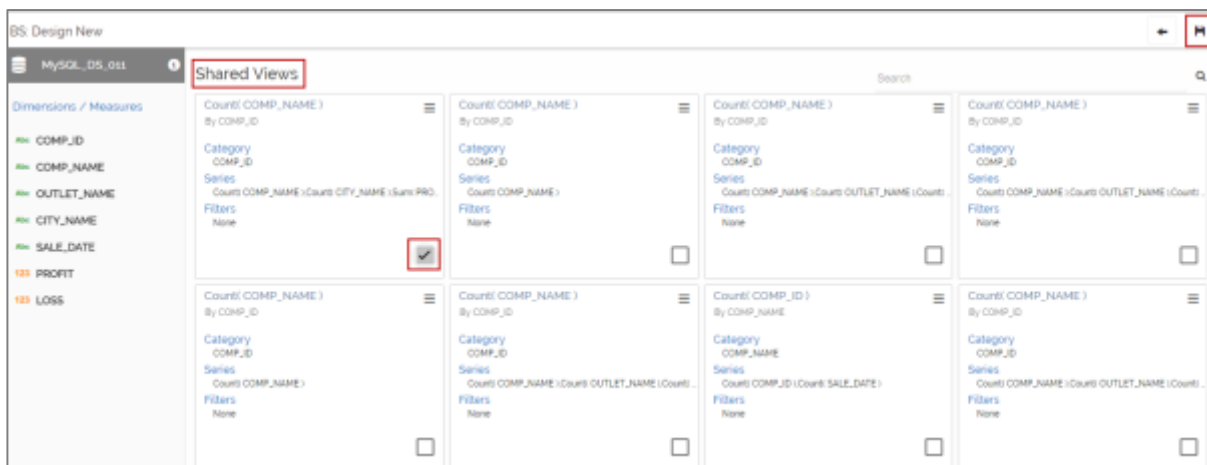
4.2. Sharing a View

The 'Shared Views' page displays all the created views for a data source. Users can get all the shared views based on a data source by selecting that data source.

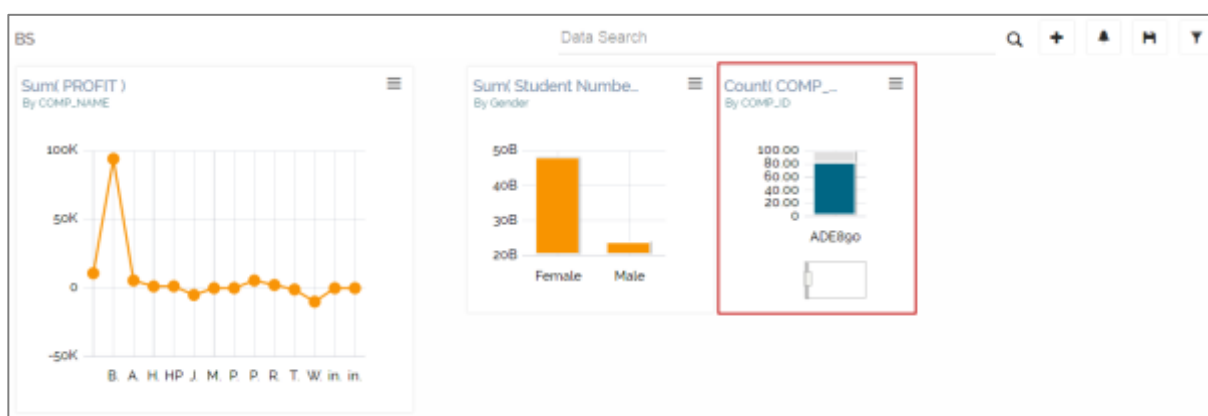
- i) Select a data source from the Data Source list.
- ii) The Dimensions/Measures list will be displayed (By default).
- iii) Click 'Shared Views' option.




- iv) All the shared views for the selected data source will be displayed.
- v) Select a shared view by check marking the box.
- vi) Click 'Save View' icon




vii) The selected shared view will be added to the Storyboard.

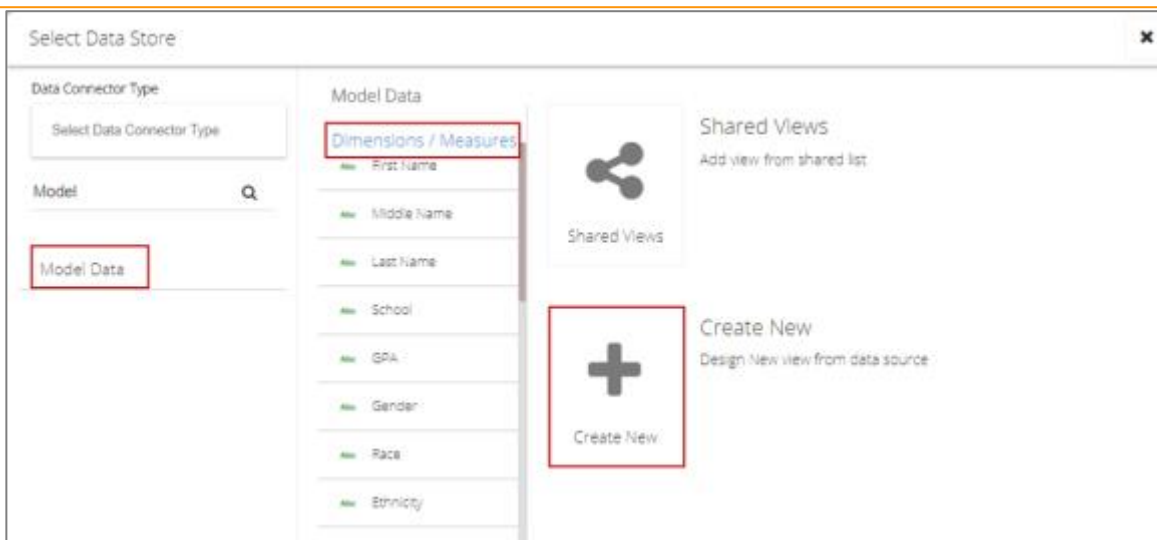


Note: Selecting 'Back' option  from the Shared View page will redirect the users to the Storyboard.

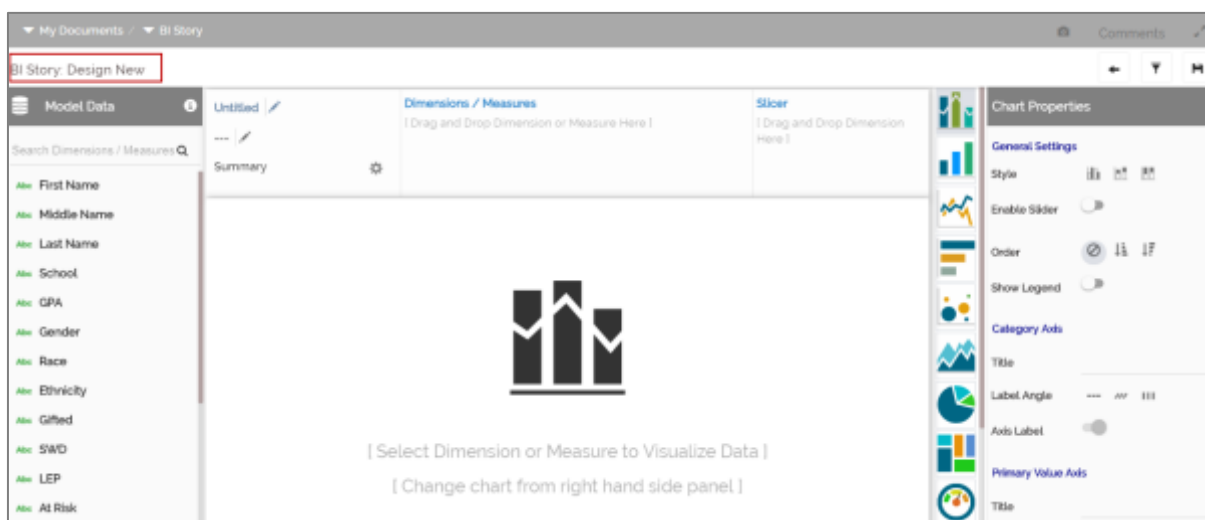
4.3. Creating a New View

Users will be redirected to create a new view by clicking the 'Create New' option.

- i) Select a data source (data store) from the data source list.
- ii) All the available Dimensions/Measures will be listed by default.
- iii) Click 'Create New' icon 



iv) Users will be redirected to the 'Design New' page.

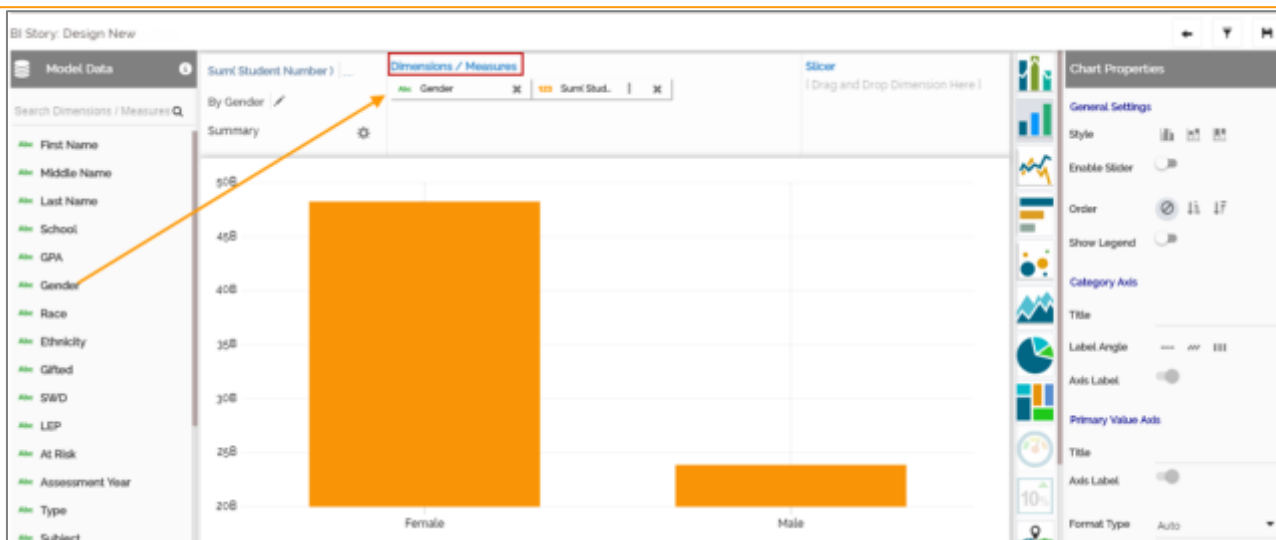


v) Drag and drop the required dimensions/measures from the data store (As displayed in the below image).

vi) A graphical view (based on the selected dimensions/measures) will be created and displayed instantly.

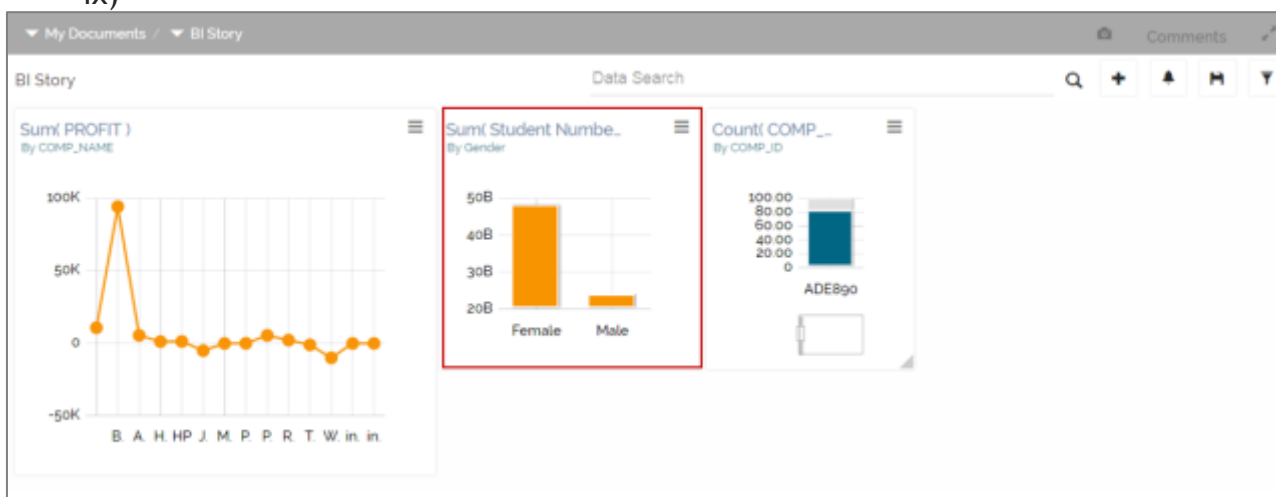
vii) Click 'Save' icon





viii) The newly created view will be saved on the Story Board.

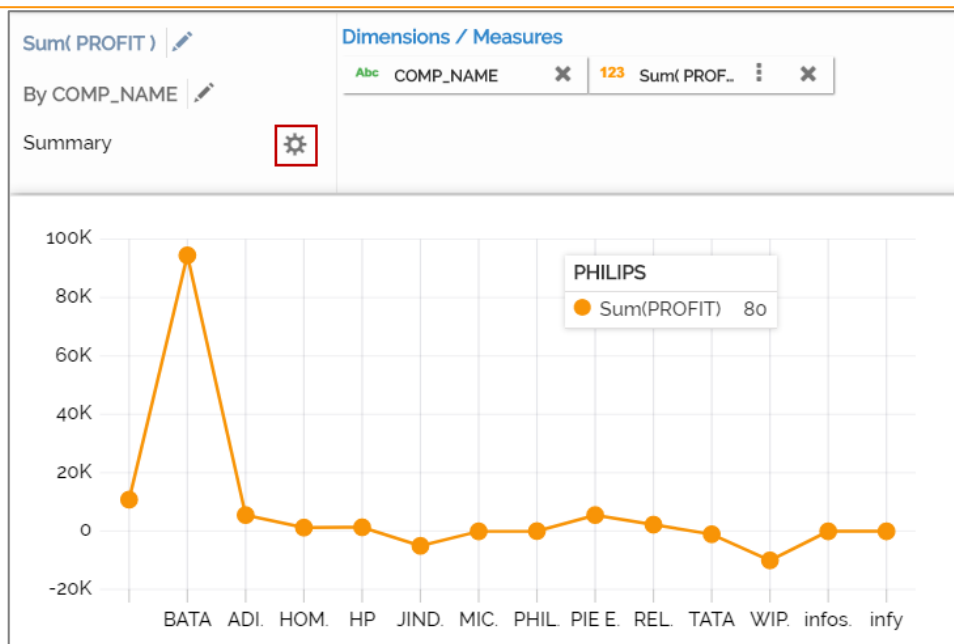
ix)



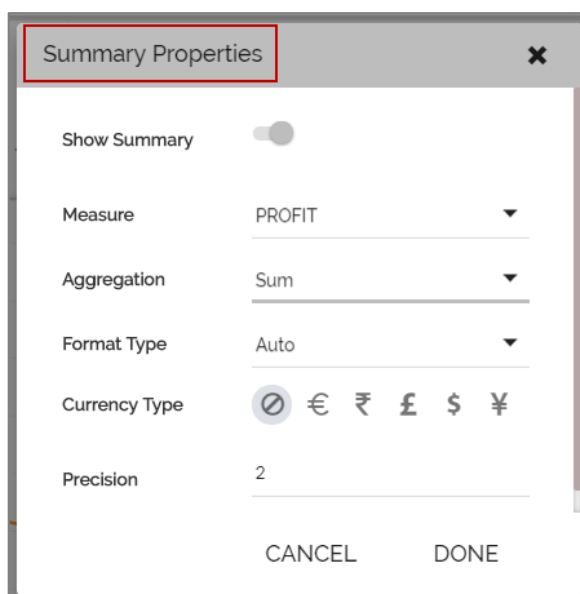
4.3.1. Measure Summary

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

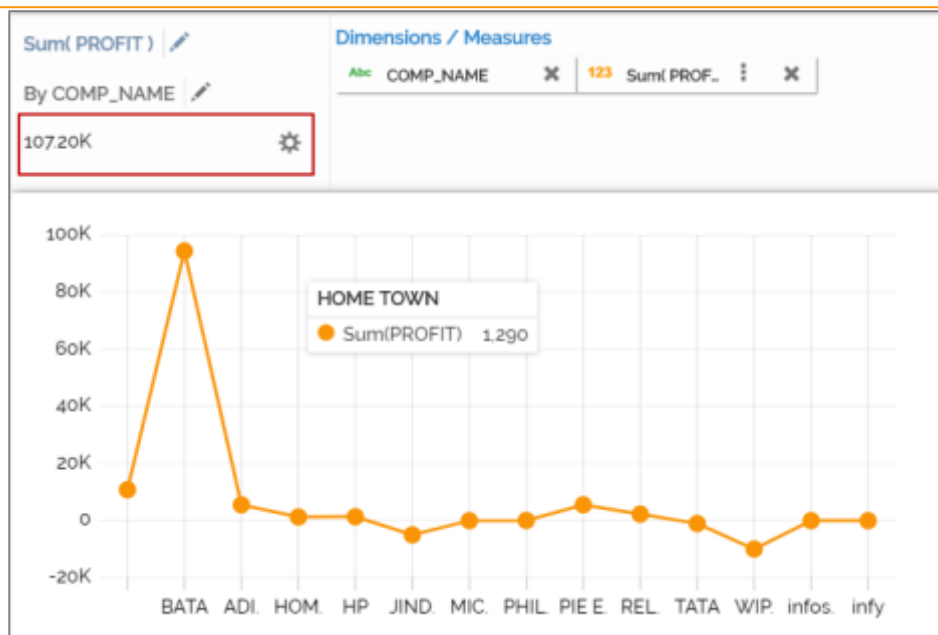
- i) Click 'Settings' via the view page.



- ii) A window pops-up.
- iii) Set the following details:
 - a) Show Summary: Enable or disable the summary option
 - b) Measure: Select a measure from the drop-down menu
 - c) Aggregation: Select an aggregation type from the drop-down menu
 - d) Format Type: Select a format type from the drop-down menu
 - e) Currency Type: Select a currency symbol from the available choices
 - f) Precision: Select a number to up to what the precision value can be displayed
- iv) Click **'DONE'**




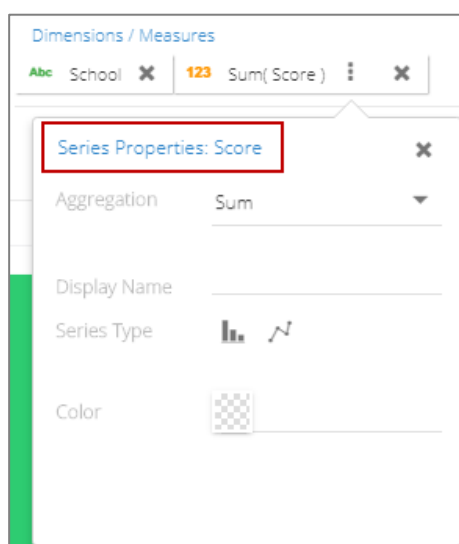
- v) The measure summary value will be displayed on the view page by enabling **'Show Summary'** option.



4.3.2. Series Properties

The Series Properties is given to change the measure display in a selected view.

- i) Navigate to the Design New page for a view that has at least one selected measure value.
- ii) Click the 'Series Properties' option  option provided next to the selected measure.
- iii) Users can set the following properties from a pop-up window:
 - a. Aggregation: Select an option from the drop-down menu
 - b. Display Name: Enter the display title for the measure
 - c. Series Type: Select a series type out of the displayed choices
 - d. Color: Choose a color



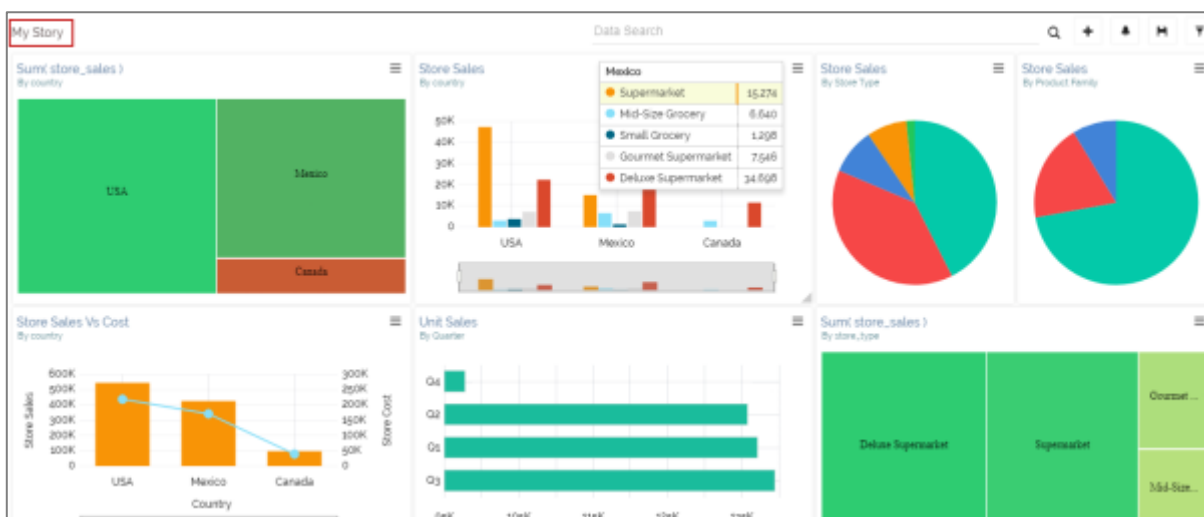
Note:

- Users need to refresh the selected data store to avail the data in the Business Story Views.
 - View specific 'Chart Properties' will be displayed on the right side of the page.
 - Users can change or modify the view title by clicking on the edit options provided next to the view name.
- Click 'Edit' icon > Modify/change the title for the selected measure or dimension > click the 'Checkmark' icon to save the change.



4.4. Story Board

Users can add multiple views on a single screen referred as Story Board. Users can add views based on various data stores on a single storyboard. The Story Board offers some additional provisions to create a new view, filter an existing view, and save an altered view on it.



Icon	Name	Description
	Data Search Bar	Searches the queried data from the data store.
	Create New View	Redirects users to the story designer page to create a new view.
	Alert Center	Redirects users to schedule an alert.
	Save Story	Saves modified views on the Story Board.
	Global Filter	Filters multiple views on a Story Board.
	Save Screen Shot	Saves the screen shot
	Comments	Allows users to describe about the story
	Full Screen/Reduce Size	Displays the Story Board in the full-screen view OR Reduces the Story Board display screen.
	Edit	Modifies or changes the storyboard title

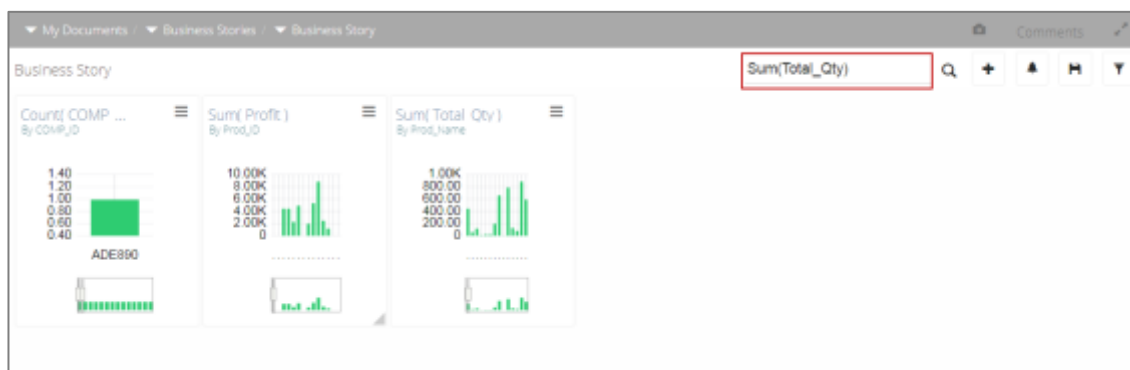
4.4.1. Data Search Bar

The 'Data Search Bar' helps users to quest for a specific data all through the saved views and instantly displays the query results.

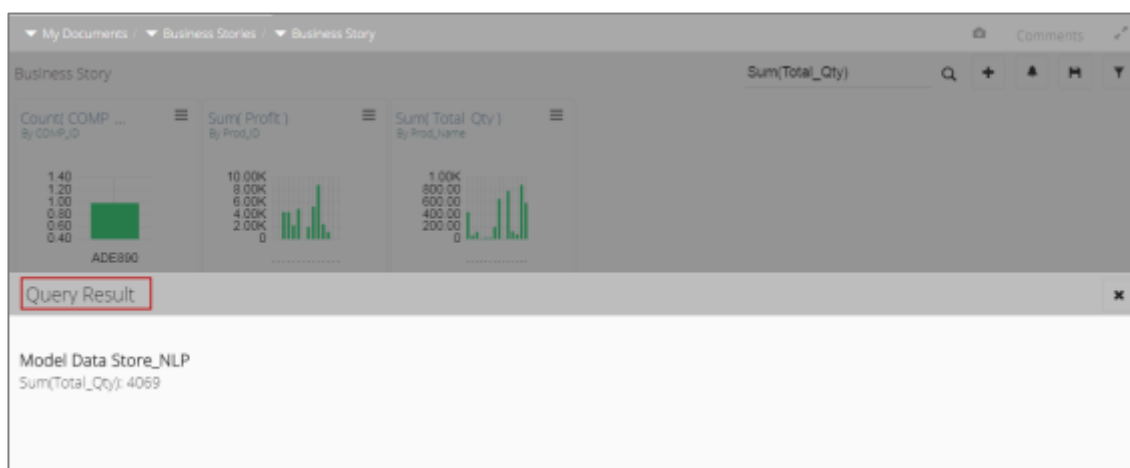
- i) Enable NLP services for a data store via the 'Schedule Data Refresh' page.

- ii) Create and Save some views based on the data store for which NLP is enabled.
- iii) Navigate to the Storyboard.
- iv) Search data through the 'Data Search Bar'. (The 'Data Search Bar' incorporates with data that confines to the saved views on the selected story board.)

v) Click the 'Search' icon



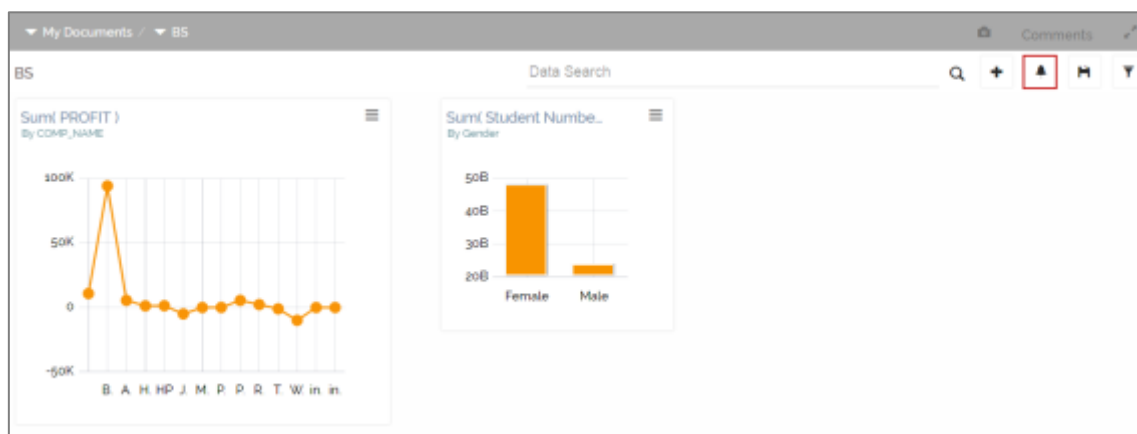
vi) The search result will be displayed as 'Query Result' with the data store name.



4.4.2. Alert Center

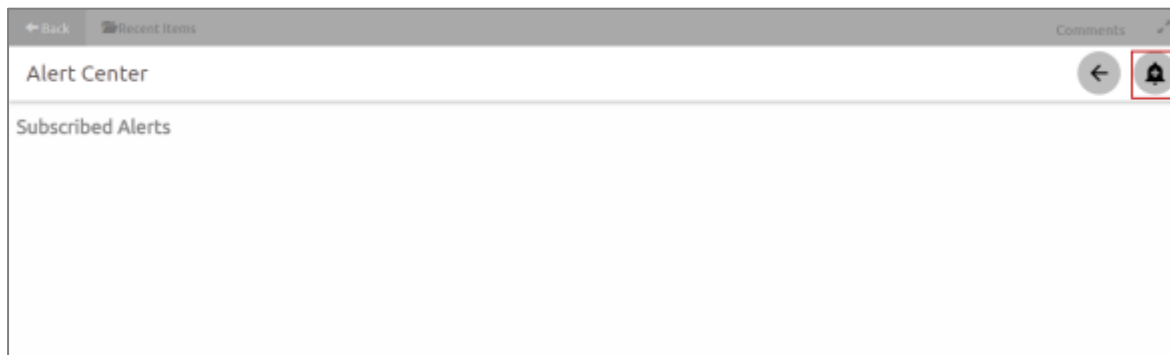
i) Navigate to the Story Board.

ii) Click the 'Alert' icon



iii) Users will be redirected to the following page.

iv) Click 'Create New Alert' option 



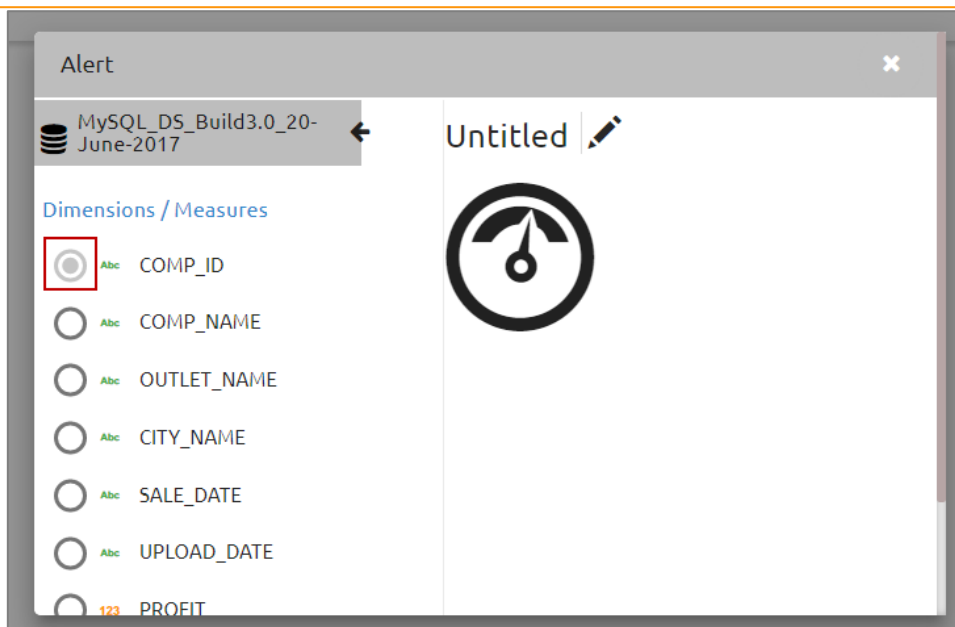
v) A new window will pop-up displaying a list of the available data sources.

vi) Select a data source from the list.

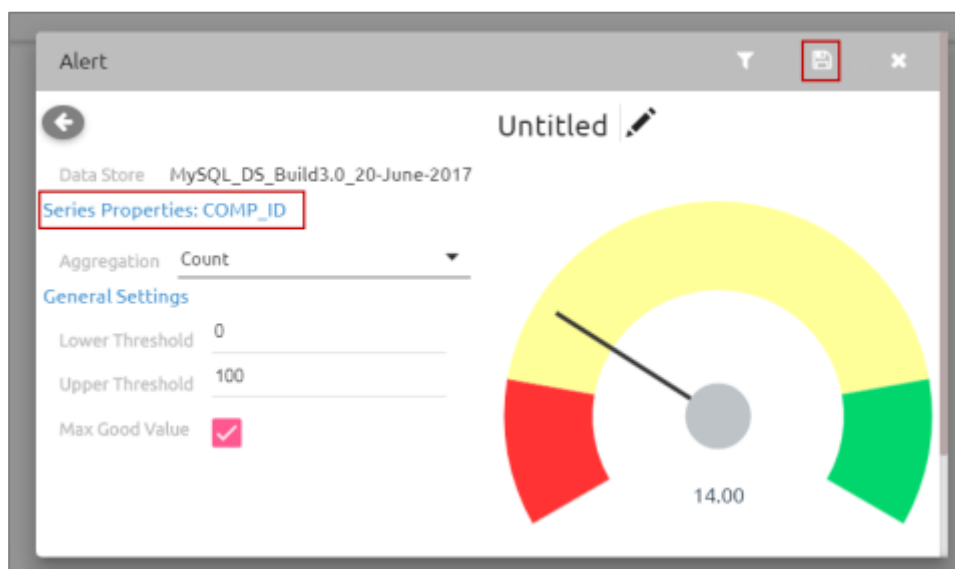


vii) By selecting a data source, a list of Dimensions and Measures will be displayed in the pop-up window.

viii) Select a dimension or measure from the list.



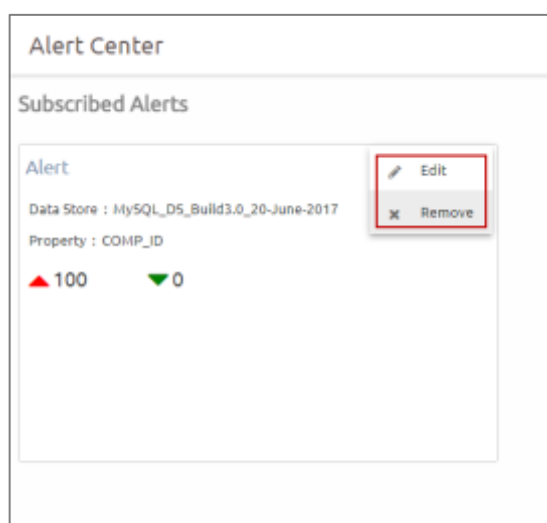
- ix) Details of the selected dimension or measure will be displayed.
- x) Click the 'Save' icon.



- xi) The newly created alert will be added on the Subscribed Alert page.

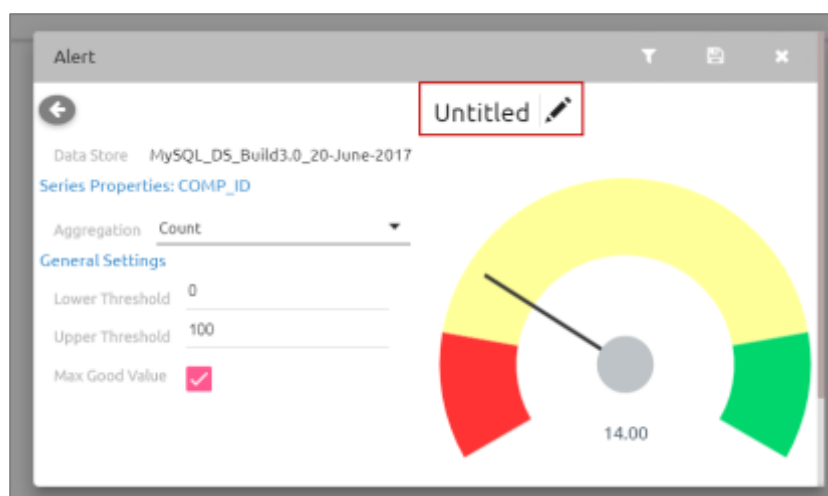


xii) Click the 'Options' icon to get 'Edit' and 'Remove' options as shown below:

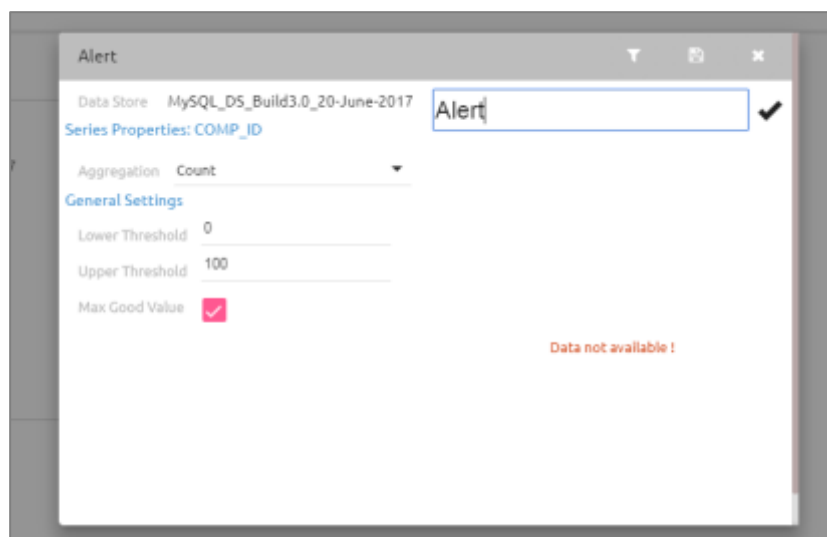


Note: Users can give a title to the subscribed alert by using the Alert pop-up window.

i) Click 'Edit' option using the alert pop-up window.



ii) Enter a title in the space and click the Check Mark icon to save the title for the newly created alert subscription.



- iii) The title will be added in the pop-up window.
- iv) The newly created alert will be listed by the same name.

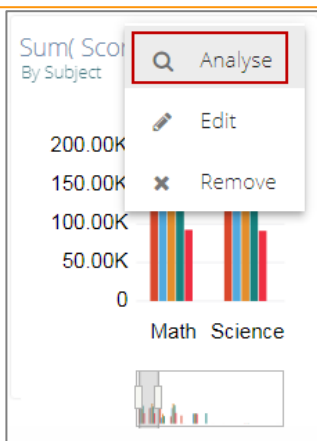


- v) Users can modify or change the inserted title by using the same 'Edit' option that has been provided to insert a title.

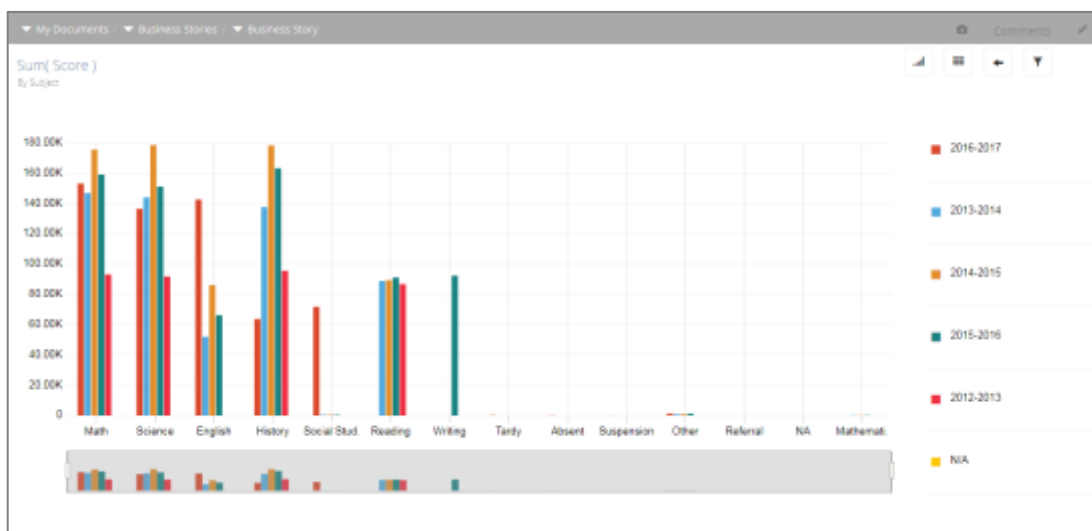
4.4.3. Options Assigned to a View

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

- **Analyze**
 - i) Select a view from the Story Board.
 - ii) Click the 'Options' icon
 - iii) A context menu appears with various options.
 - iv) Select 'Analyze' from the context menu.



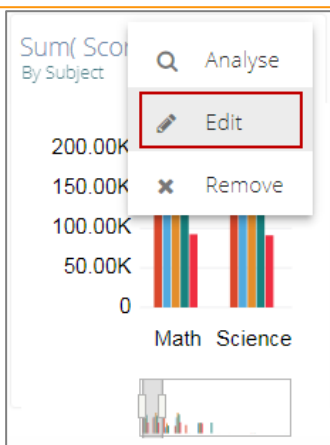
v) The selected view will be displayed in the full screen.



vi) Users can select any of the following option to analyze the view:

Option	Name	Description
	Chart	Displays data in a chart view
	Grid	Displays data in a grid view
	Back	Directs back to the Story Board
	View Filter	Displays filter panel to apply or edit view specific filter values

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



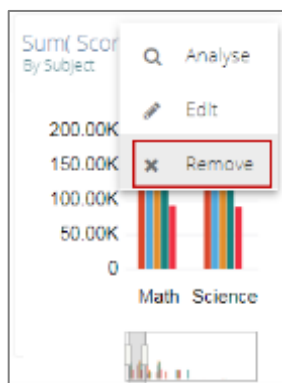
- iv) Users will be directed to the designer page.
- v) Edit the required details.
- vi) Click 'Save'.



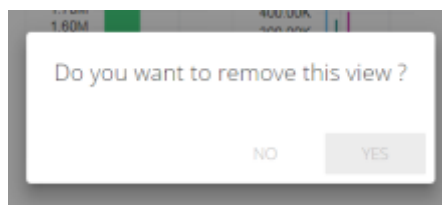
- vii) The modified view will be saved successfully on the Story Board.

- **Remove**
 - i) Select a view from the Story Board.

- ii) Click the 'Options' icon
- iii) Select 'Remove' from the context menu.



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



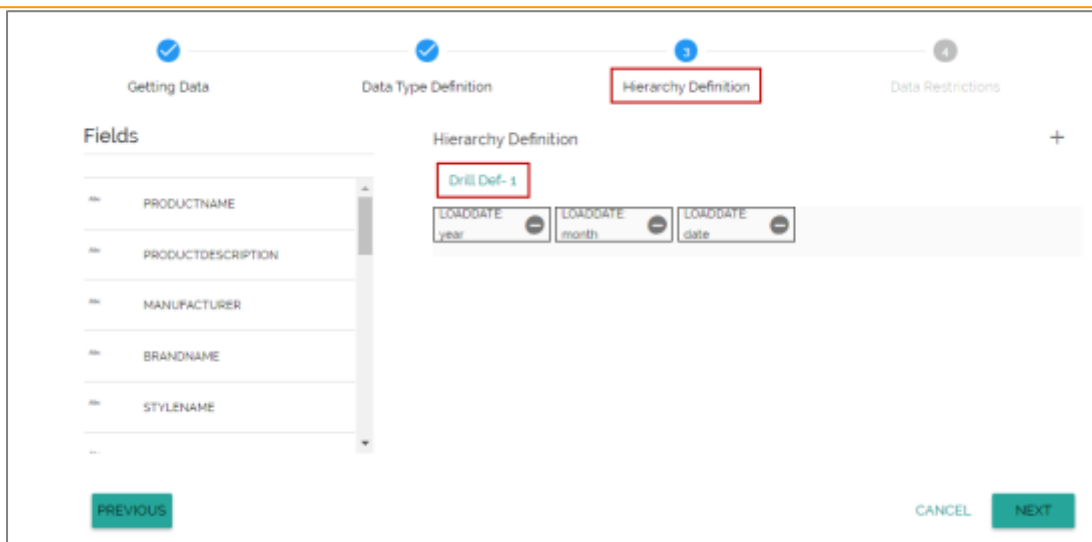
- vi) The selected view will be removed from the Story Board.


4.4.4. Automatic Date Drill

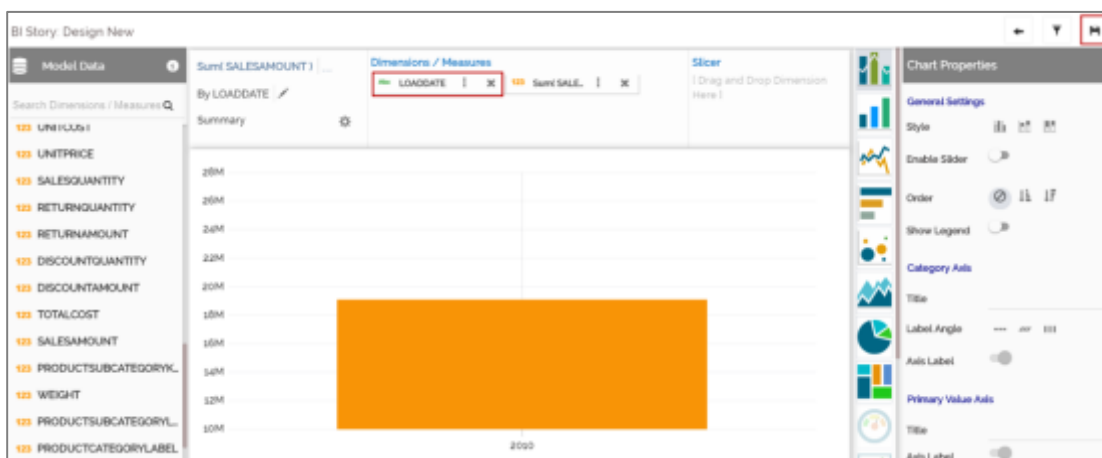
The Auto Date Drill allows users to drill down in the time values of a saved view on story board of a Business Story.

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.



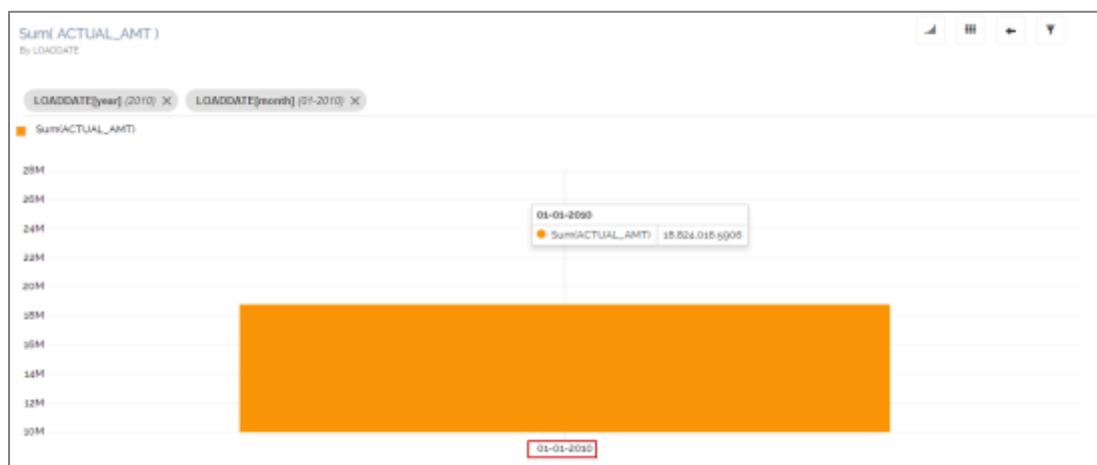
- ix) Access the saved view on the storyboard by double clicks on it.
- x) Users will be directed to the 'Analyse' window displaying time in the highest-level granularity (E.g. Year).



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



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




Note:

- a. Users can also define the dimension values and use drill-down functionality for a saved view on the Storyboard.
- b. Users can also open a saved view via the 'Analyze' option.

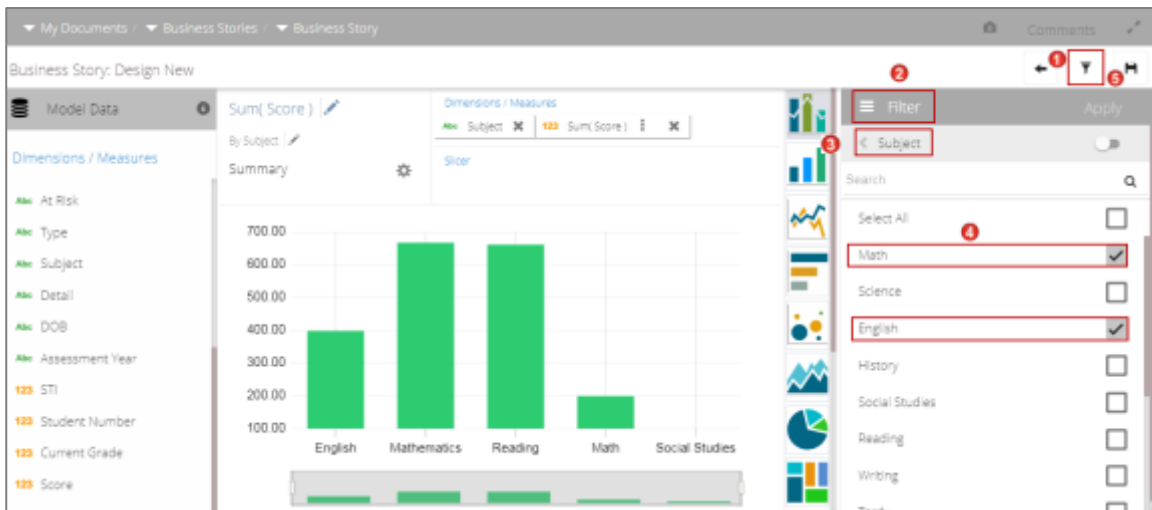
4.5. Applying Filter

Users can apply filter to a view or the entire business story.

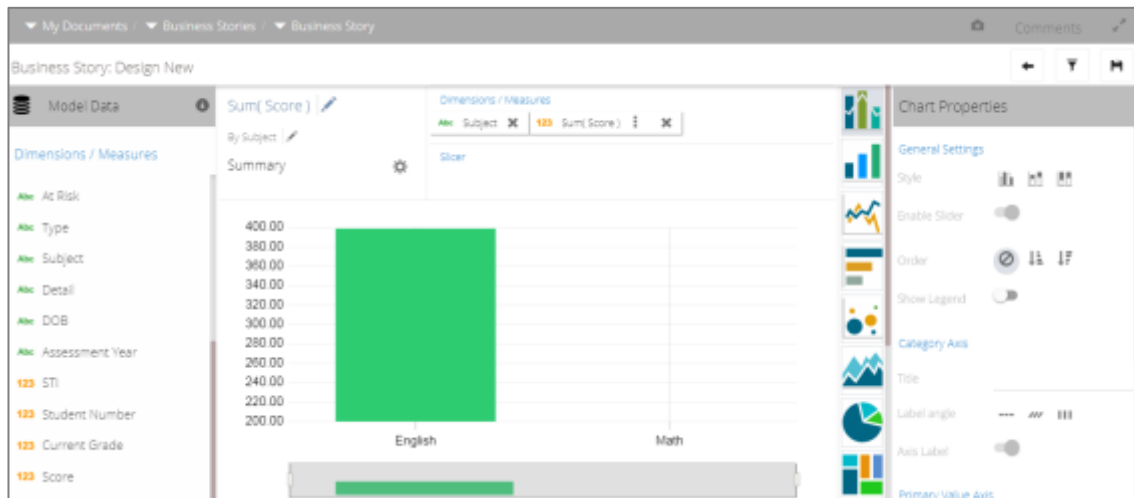
- **View Specific Filter**

- i) Click 'Filter'  on the Story Designer.
- ii) A filter panel opens with the list of filter values.
- iii) Click on a filter value to display a list containing all the sub-filter values.
- iv) Select a sub-filter value by check marking the box.

v) Click 'Apply'.



vi) The selected filter values will be applied to the concerned view.




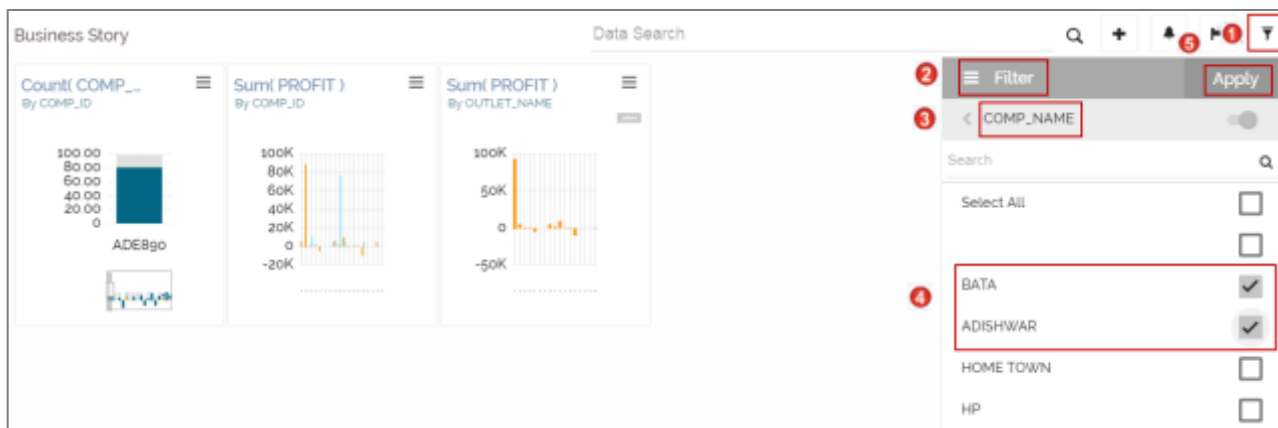
Note:

- a. Users need to click 'Apply' button while enabling or eliminating the view specific filter values to reflect the same in the view.
- b. Users can insert, modify, or remove a view specific filter via 'Analyse' option.
- c. Users can add a filter based on the 'Measures' values.
 - i) Open the Filter panel on the Design New page.
 - ii) All the selected dimensions and measures will be listed.
 - iii) Select a measure as a filter value.
 - iv) Select a condition from the drop-down menu.
 - v) Click 'Apply'.
 - vi) The selected filter value will be applied to the view.

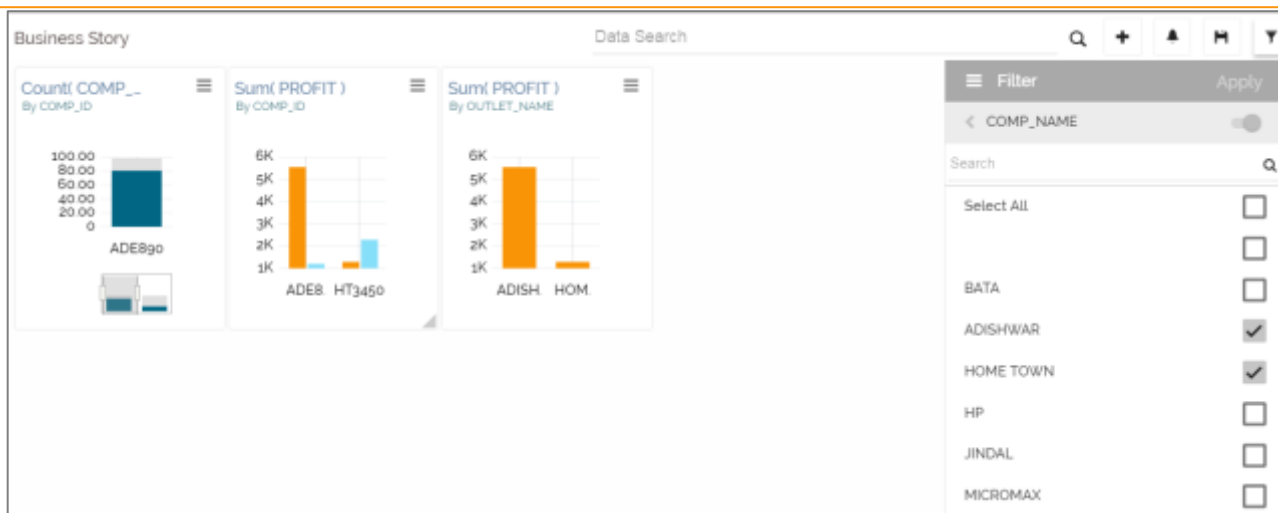


- **Global Filter**

- Click 'Global Filter'  on the Story Board.
- A filter panel opens with the list of filter values.
- Click on a filter value to display a list containing all the sub-filter values.
- Use a check mark in the check box to select a sub-filter value.
- Click 'Apply'.

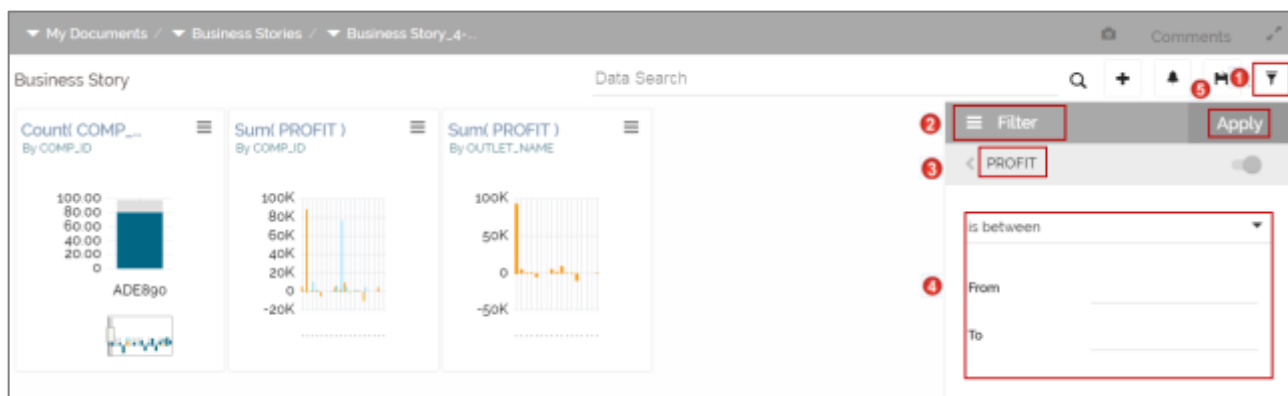


- The global filter will be applied to all the concerned views on a Storyboard.



Note:

- a. Global filter can be applied only to those views on the story board where the filter values are used as dimensions.
- b. Global filter when applied to various views on a story board, subdues the view specific filter values.
- c. Users can insert views created via different data stores on one Story Board. By default, the Global filter panel will display all the obtainable filter values across the data stores.
- d. Users can filter data based on the 'Measures' values.
 - i) Click the 'Global Filter' icon
 - ii) The Filter panel will be opened on the Story Board.
 - iii) Select a measure as a filter value.
 - iv) Select a condition from the drop-down menu.
 - v) Click 'Apply'.

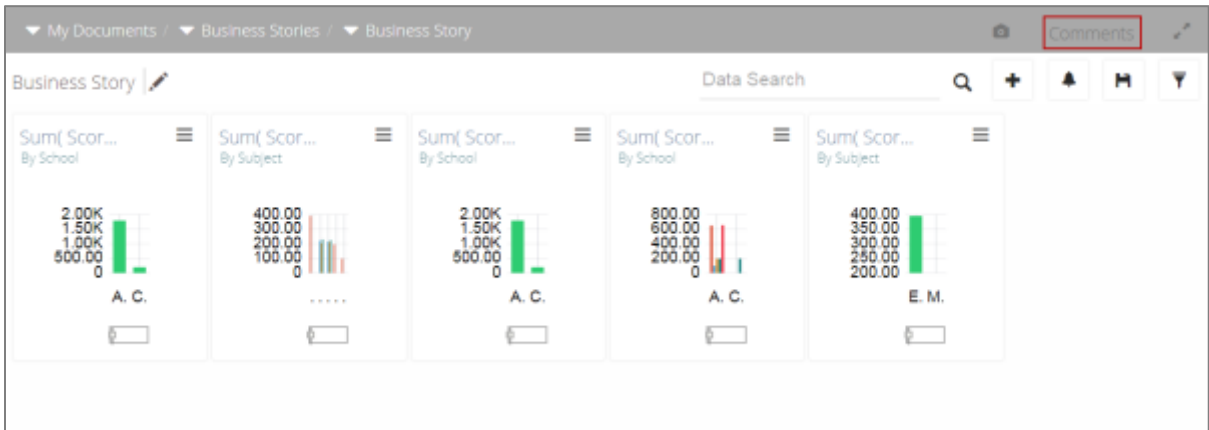



- vi) The selected filter value will be applied to the view.

4.6. Comments

Users can access 'Comments' option on the menu row while designing a story.

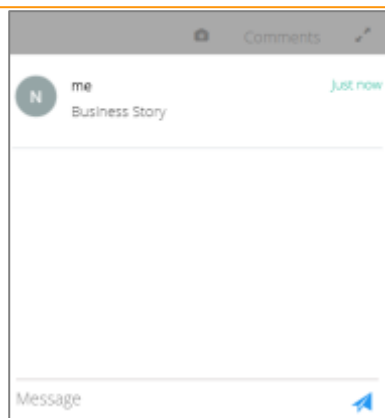
- i) Click 'Comments'.



- 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 entered comment will be sent to the 'Comments' window.



Note:

- a. 'Comments' feature is enabled to all the users who can access the story document
- b. The inserted comments will display user initials and record of time (when it was inserted).

4.7. Adding a Slicer

Users can add an additional dimension into the created view using the 'Slicer' option.

- i) Drag and drop required dimension and measure in the 'Dimensions/ Measures' column on the designer page.
- ii) Drag and drop another dimension as 'Slicer'.
- iii) It will display slices in the created view based on the second-dimension value via a column chart (by default)
E.g. The following image shows employees' first names forming one 'Department' in a stack percentage chart view.



Note: Slicer will support selection of only one dimension and one measure in the 'Dimension/Measures' space. Another dimension should be added under the 'Slicer' space.

5. View Options

This section explains all the available views and view properties provided on the Business Story workspace.

5.1. Mixed Chart

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

Best situation to use Mixed Chart:

To compare multiple categories

Example:

To analyze company's budget v/s revenue.

Variations of this chart:

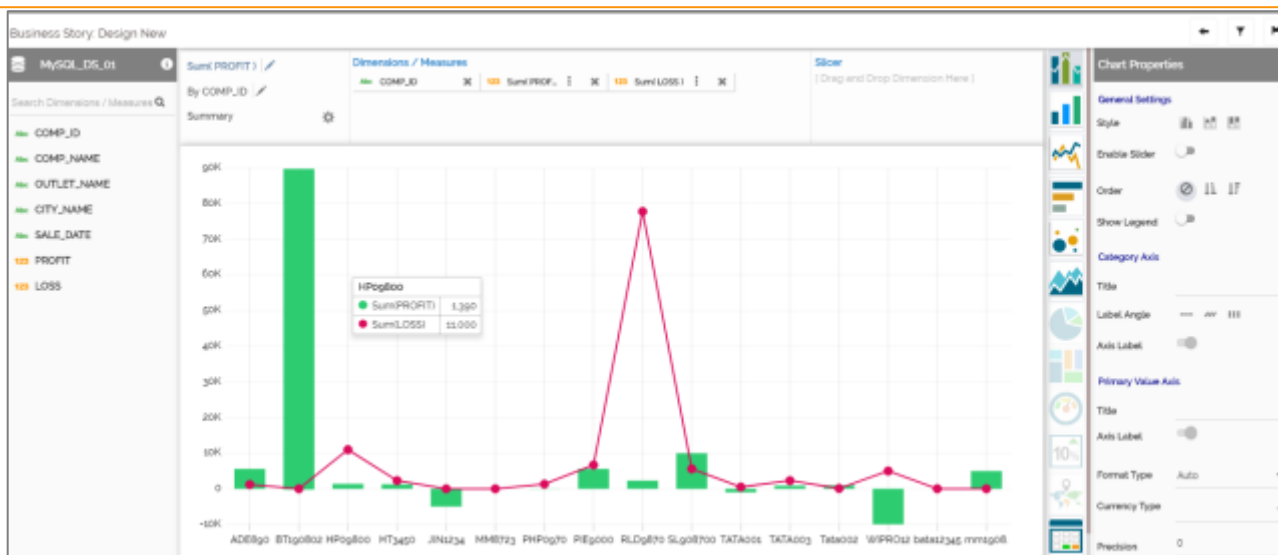
Use stacked Column charts: Multiple categories can be clubbed together on top of each other which makes addressing multiple questions easier.

Use columns side by side: Comparison between multiple categories becomes easier instead of toggle between charts and data.

Add color for quick insight: Where displaying columns with colors will make users to pay quick attention to important tasks.

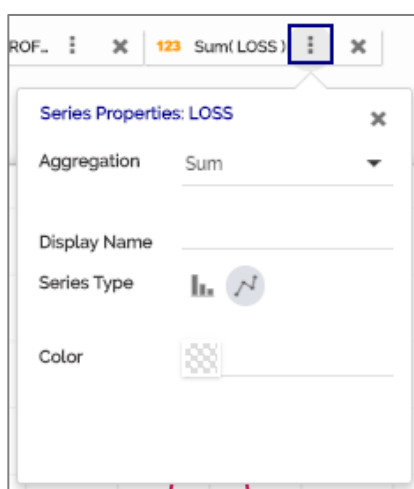
Chart Properties:

- i) General Settings
 - a. Style: Select a style for the data display
 - b. Enable Slider: Enable slider by turning on the radio button
 - c. Order: Select an order for displaying data
 - d. Show Legend: Display legend by turning on the radio button
After enabling '**Show Legend**', users need to select the following information:
 - i. Legend Style: Select one of the following option by using the drop-down menu
 1. Fixed
 2. Floating
 - ii. Legend Orientation: Select one of the following option by using the drop-down menu
 1. Vertical
 2. Horizontal
- ii) Category Axis:
 - a. Title: Provide a title for the axis
 - b. Label Angle: Select a display angle for the label
 - c. Axis Label: Enable the category axis label by turning on the radio button
- iii) Primary Value Axis:
 - a. Title: Provide a title for the primary value axis
 - b. Axis Label: Enable the primary value axis label by turning on the radio button
 - c. Format Type: Select a desired format type from the drop-down menu
 - d. Currency Type: Select a currency symbol to be displayed in the view
 - e. Precision: Set the after-decimal value (It will display up to 5 precision)
- iv) Secondary Value Axis:
 - a. Enable: Enable the secondary value axis label by turning on the radio button
 - b. Title: Provide a title for the secondary value axis
 - c. Format Type: Select a desired format type from the drop-down menu
 - d. Currency Type: Select a desired currency symbol from the list
 - e. Precision: Set the after-decimal value (It will display up to 5 precision)



Note: Users are required to configure settings for the secondary axis from the ‘Series Properties’ to display it on the chart.

- i) Click ‘Series Properties’  provided next to a measure name
- ii) A new window will open
- iii) Configure the required details:
 1. Aggregation
 2. Display Name
 3. Series Type
 4. Axis
 5. Color



5.2. Column Chart

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

Best Situation to use Column charts:

Column charts are good for displaying data sets with negative values

Example:

To find the best and worst performers in an organization

Variations of this chart

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

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

Add color for quick insight: Displaying the columns with colors will make users to pay quick attention to important tasks.

Chart Properties:

- i) General Settings
 - a. Style: Select a style for the data display
 - b. Enable Slider: Enable slider by turning on the radio button
 - c. Order: Select an order for displaying data
 - d. Show Legend: Display legend by turning on the radio button
After enabling '**Show Legend**', users need to select the following information:
 - i. Legend Style: Select one of the following option by using the drop-down menu
 1. Fixed
 2. Floating
 - ii. Legend Orientation: Select one of the following option by using the drop-down menu
 1. Vertical
 2. Horizontal
- ii) Category Axis
 - a. Title: Provide a title for the axis
 - b. Label Angle: Select a display angle for the label
 - c. Axis Label: Enable the category axis label by turning on the radio button
- iii) Primary Value Axis
 - a. Title: Provide a title for the primary value axis
 - b. Axis Label: Enable the primary value axis label by turning on the radio button
 - c. Format Type: Select a format type from the drop-down menu
 - d. Currency Type: Select a currency type from the displayed options
 - e. Precision: Set the after-decimal value (It will display up to 5 precision)
- iv) Secondary Value Axis
 - a. Enable: Enable the secondary value axis label by turning on the radio button
 - b. Title: Provide a title for the second value axis
 - c. Format Type: Select a format type from the drop-down menu
 - d. Currency Type: Select a currency type from the displayed options
 - e. Precision: Set the after-decimal value (It will display up to 5 precisions)



Note: This chart type can display both primary and secondary value axis in column format. It is required to enable the secondary axis from the **‘Measure Properties’** to display it on the chart.

5.3. Line Chart

Line charts connect individual numeric data points to create a sequence of values. They are primarily used to display trends over a period.

Best Situation to use Line Charts:

View trends in data over a period

Examples:

To indicate increasing revenue or varying stock price

Variations of this chart

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

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

Chart Properties:

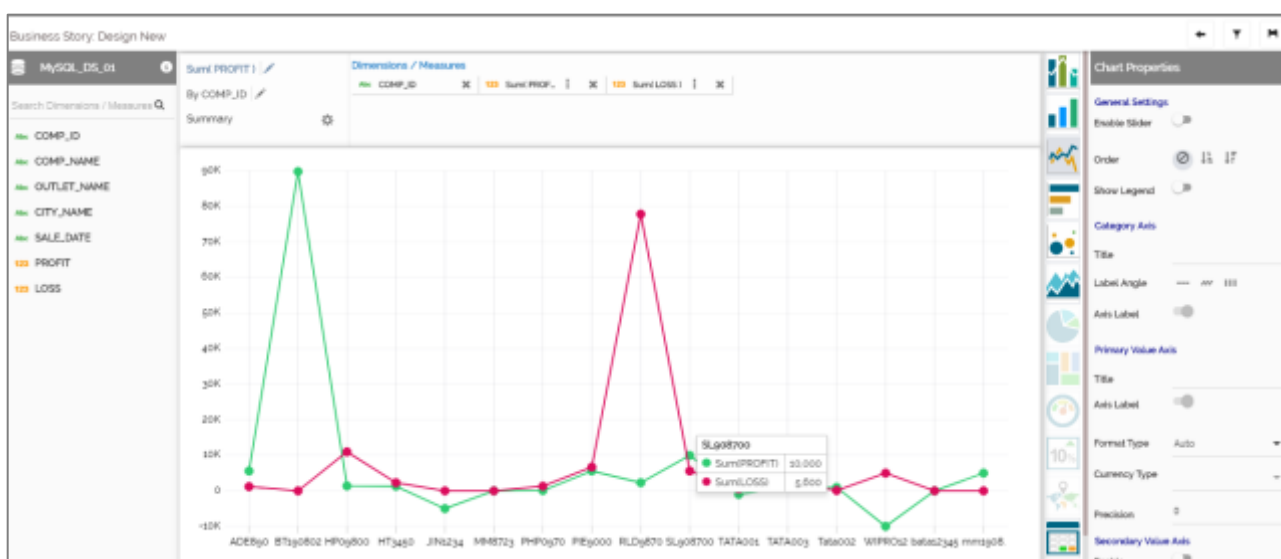
i) General Settings

- a. Style: Select a style for the data display
- b. Enable Slider: Enable slider by turning on the radio button
- c. Order: Select an order for displaying data
- d. Show Legend: Display legend by turning on the radio button

After enabling **‘Show Legend’**, users need to select the following information:

- i. Legend Style: Select one of the following option by using the drop-down menu

1. Fixed
 2. Floating
- ii. Legend Orientation: Select one of the following option by using the drop-down menu
 1. Vertical
 2. Horizontal
- ii) Category Axis
 - a. Title: Enter a title for the category axis
 - b. Label Angle: Select a display angle for the label
 - c. Axis Label: Enable the category axis labels by turning on the radio button
 - iii) Primary Value Axis
 - a. Title: Enter a title for the primary value axis
 - b. Axis Label: Enable the primary value axis labels by turning on the radio button
 - c. Format Type: Select a desired format type from the drop-down menu
 - d. Currency Type: Select a currency type from the displayed options
 - e. Precision: Set the after-decimal value (It will display up to 5 precision)
 - iv) Secondary Value Axis
 - a. Enable: Enable the secondary value axis by turning on the radio button
 - b. Title: Enter a title for the secondary value axis
 - c. Format Type: Select a format type from the drop-down menu
 - d. Currency Type: Select a currency type from the displayed options
 - e. Precision: Set the after-decimal value (It will display up to 5 precision)



5.4. Bar Chart

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

Best situation to use bar chart:

When the data set is small it would be easier to the end user to interpret data. Observations can be performed over a period.

Examples:

- a. Quarterly sales of an organization

b. Percentage of change in sales or revenue can be indicated

Variations of this chart:

Add color for quick insight: Displaying the bars with colors will make users to pay quick attention to important tasks.

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

Chart Properties:

i) General Settings

- a. Order: Select an order for the display of data
- b. Show Legend: Enable legend by turning on the radio button

After enabling 'Show Legend', users need to select the following information:

- i. Legend Style: Select one of the following option by using the drop-down menu
 1. Fixed
 2. Floating
- ii. Legend Orientation: Select one of the following option by using the drop-down menu
 1. Vertical
 2. Horizontal

ii) Category Axis

- a. Title: Enter a title for the category axis
- b. Axis Label: Enable the category axis labels by turning on the radio button

iii) Primary Value Axis

- a. Title: Enter a title for the primary value axis
- b. Axis Label: Enable the primary axis labels by turning on the radio button
- c. Label Angle: Select a display angle for the label
- d. Format Type: Select a format type from the drop-down menu
- e. Currency Type: Select a currency type from the displayed options
- f. Precision: Set the after-decimal value (It will display up to 5 precision)



5.5. Bubble Chart

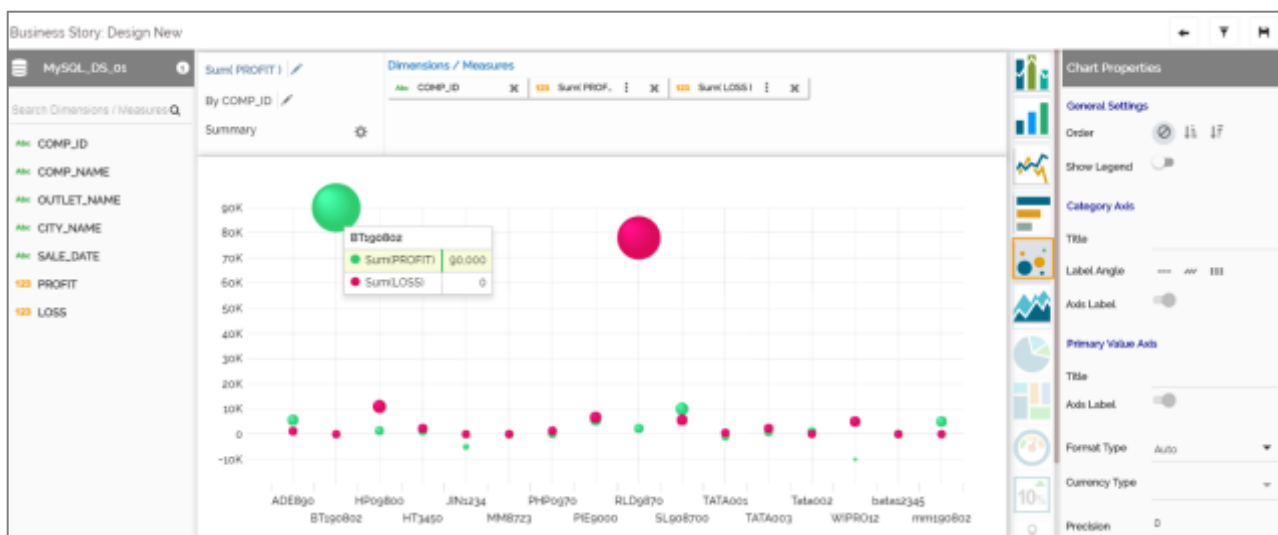
A Bubble chart visualizes data set in three or four dimensions. Where the first two dimensions are used as coordinates like x-axis and y-axis. The remaining two are used to represent color and size of the bubbles. Mostly used to plot financial data.

Best situation to use a Bubble Chart:

Three Data Series: If your data has three series each containing values then you can use bubble chart for better representation. Generally, the sizes of the bubble are determined by the values.

Chart Properties:

- i) General Settings
 - a. Order: Select an order for the display of data
 - b. Show Legend: Enable legend by turning on the radio button
After enabling 'Show Legend', users need to select the following information:
 - i. Legend Style: Select one of the following option by using the drop-down menu
 1. Fixed
 2. Floating
 - ii. Legend Orientation: Select one of the following option by using the drop-down menu
 1. Vertical
 2. Horizontal
- ii) Category Axis
 - a. Title: Enter a title for the category axis
 - b. Label Angle: Select a display angle for the label
 - c. Axis Label: Enable category axis labels by turning on the radio button
- iii) Primary Value Axis
 - a. Title: Enter a title
 - b. Axis Label: Enable primary value axis labels by turning on the radio button
 - c. Format Type: Select a format type from the drop-down menu
 - d. Currency Type: Select a currency type from the displayed options
 - e. Precision: Set the after-decimal value (It will display up to 5 precision)



5.6. Area Chart

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

Best situation to use Area Chart:

Examples:

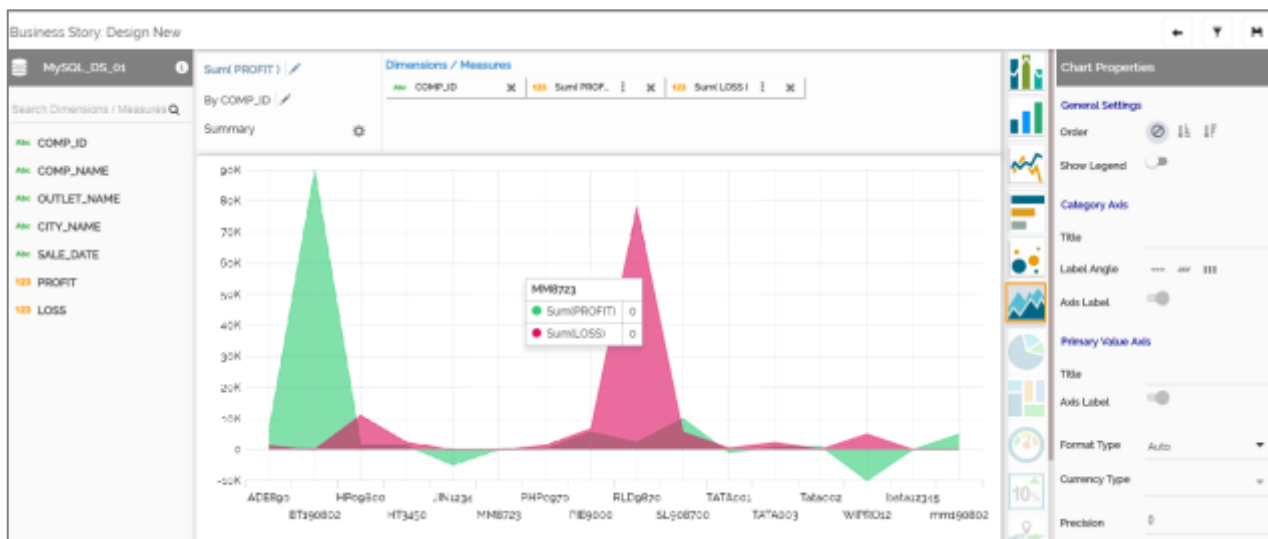
- To view the automobile sales of a manufacturer over a period.
- To view the revenue growth of an organization by quarter wise.

Variations of this chart:

Line charts

Chart Properties:

- i) General Settings
 - a. Order: Select an order to display data
 - b. Show Legend: Enable legend by clicking in the check box
After enabling '**Show Legend**', users need to select the following information:
 - i. Legend Style: Select one of the following option by using the drop-down menu
 1. Fixed
 2. Floating
 - ii. Legend Orientation: Select one of the following option by using the drop-down menu
 1. Vertical
 2. Horizontal
- ii) Category Axis
 - a. Title: Enter an axis title
 - b. Label Angle: Select a display angle for the label
 - c. Axis Label: Enable the category axis labels by turning on the radio button
- iii) Primary Value Axis
 - a. Title: Enter an axis title
 - b. Axis Label: Enable the primary value axis labels by turning on the radio button
 - c. Format Type: Select a format type from the drop-down menu
 - d. Currency Symbols: Select a currency type from the displayed options
 - e. Precision: Set the after-decimal value (It will display up to 5 precisions)



5.7. Pie Chart

The most widely used chart to show proportions, percentages and categorizes information. Mainly used for comparison where the users can find out easily which category is most popular and which is least popular.

Best situation to use Pie Chart:

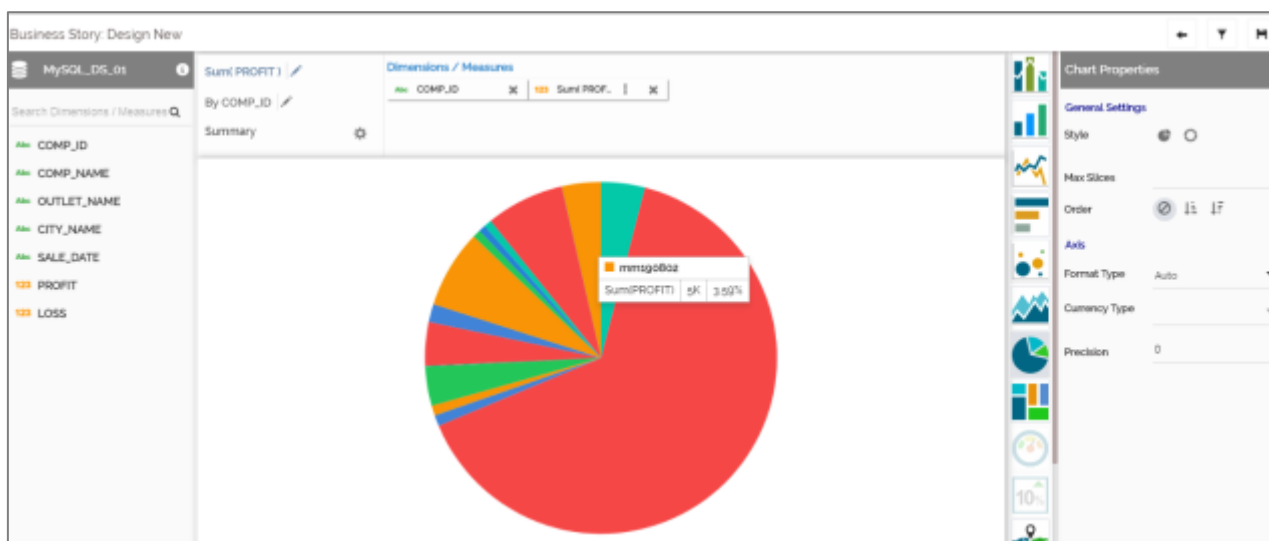
Mainly used for comparison of categories available on the pie to find out top performers and least performers. Better for viewing if the category is limited to 6 or fewer.

Variations of this chart:

Pie-Doughnut: Doughnut charts are like Pie-chart all you need to do is to switch the pie-chart to doughnut.

Chart Properties:

- i) General Settings
 - a. Style: Select a style for the data display
 - b. Max Slices: Set maximum number of slices to be displayed
 - c. Order: Select an order to display data
- ii) Axis
 - a. Format Type: Select a desired format type from the drop-down menu
 - b. Currency Symbols: Select a desired currency symbol
 - c. Precision: Set the after-decimal value (It will display up to 5 precisions)



5.8. Tree Map Chart

Tree Map charts are used to display large amounts of hierarchical data. When users want to view all their hierarchical data at one time, tree maps can be used. Each rectangle represents a branch in a tree and it also shows how much data it comprises. The size and position of the rectangles are based on the quantitative variable used for the chart. Patterns across the data can be identified using the size and color of the rectangles.

Best situation to use Tree map:

When users want to view all their hierarchical data at one time.

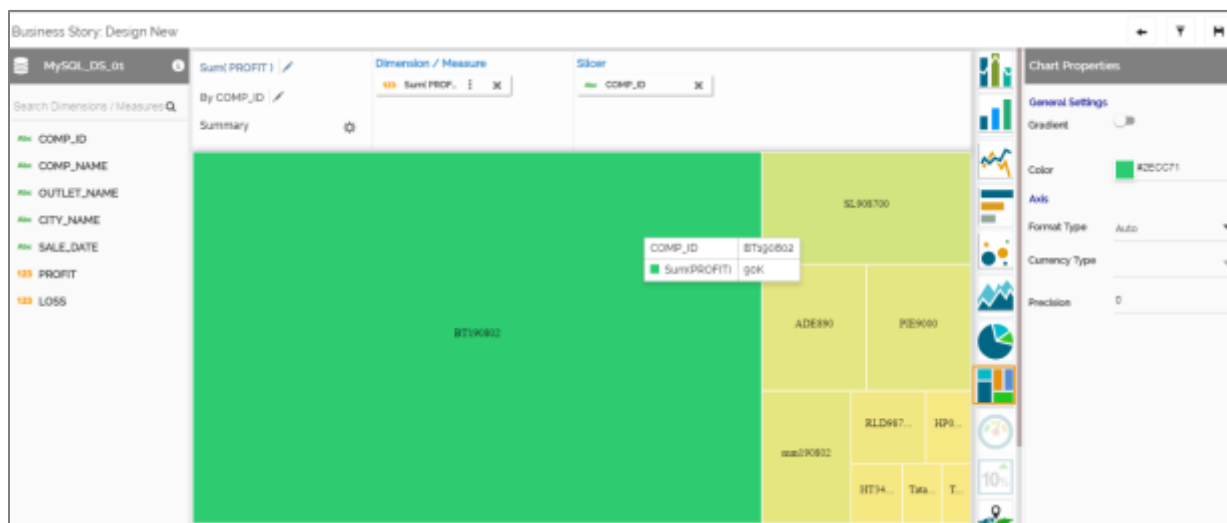
Variations of this chart:

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

Chart Properties:

- i) General Settings
 - a. Gradient: Enable gradient by turning on the radio button
 - b. Color: Set a color for gradient

- ii) Axis:
 - a. Format Type: Select a format type from the drop-down menu
 - b. Currency Type: Select a currency type from the displayed options
 - c. Precision: Set the after-decimal value (It will display up to 5 precision)



5.9. Semi Gauge Chart

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

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

Best Situation to use Semi-Gauge:

To monitor any performance that contains predefined ranges

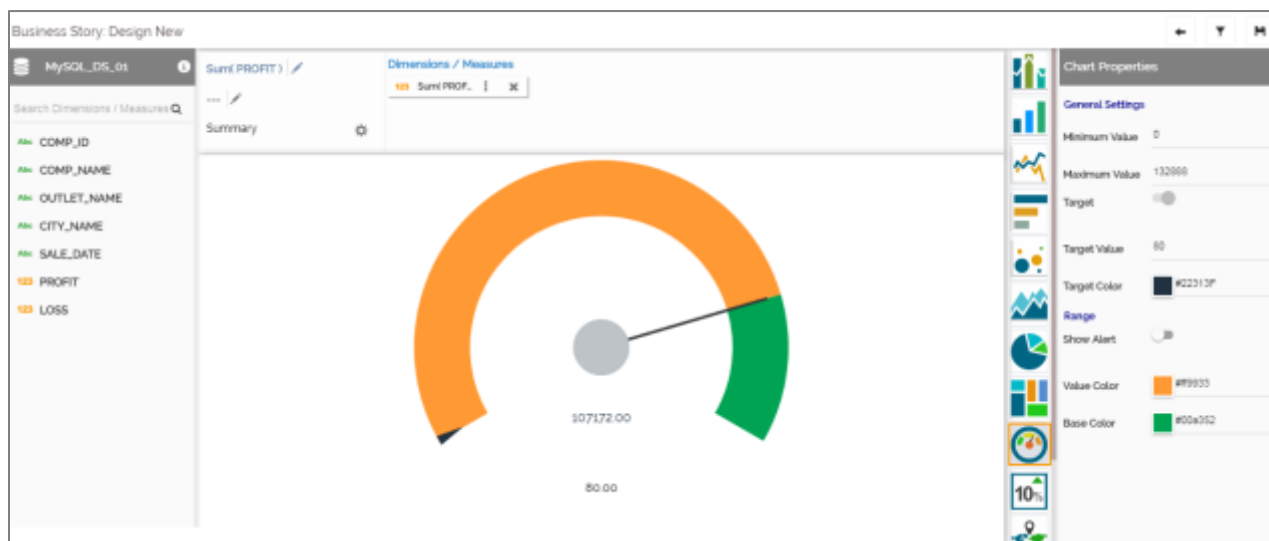
Examples:

Overall performance of a student/class in an examination.

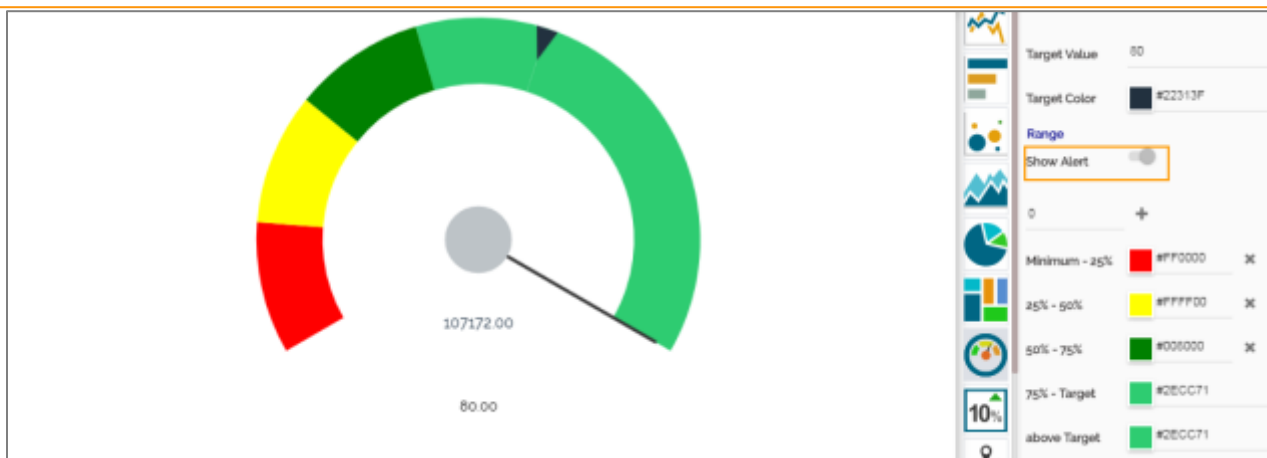
Chart Properties:

- i) General Settings
 - a. Minimum Value: Set a minimum value to be shown on the chart (It should be less than the maximum set value)
 - b. Maximum Value: Set a maximum value to be shown on the chart (It should be more than the minimum set value)
 - c. Target: Enable target by turning on the radio button
 - d. Target Value: User defined value to set a target
 - e. Target Color: Set a target color

- ii) Range
 - a. Show Alert: Enable various ranges (in %) by turning on the radio button
 - b. Value Color: Set a value color
 - c. Base Color: Set a base color



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



Note: Target value should be included under the range of minimum and maximum set values.

5.10. KPI Tile

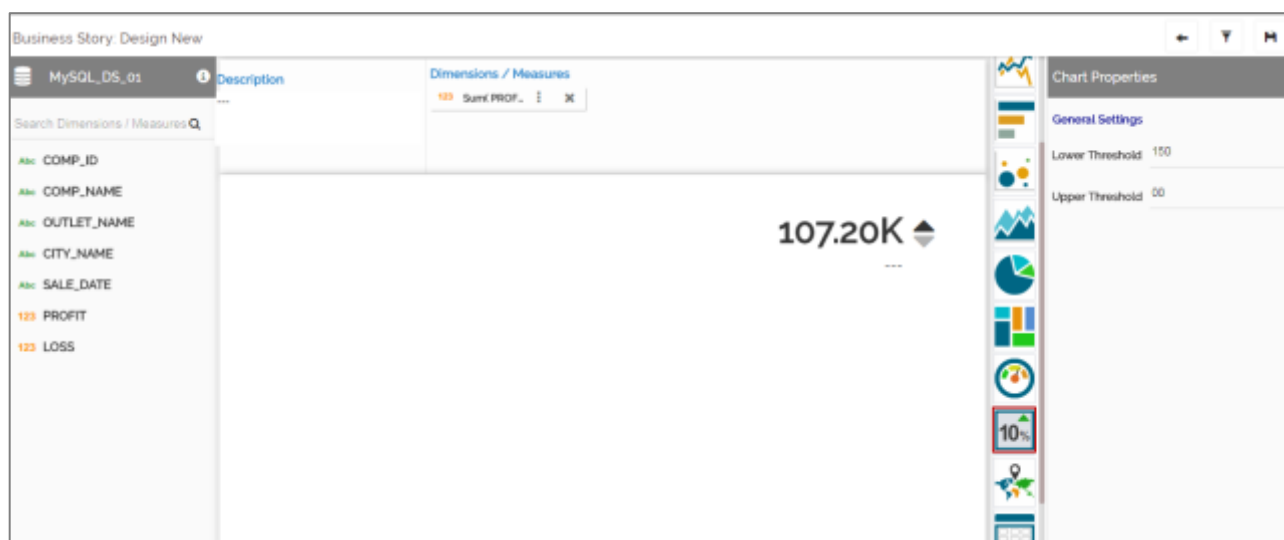
The KPI Tile will display the sum of the quantity with a value indicator

Values to be selected:

- Dimension: None
- Measure: 1

Chart Properties:

- i) General Settings
 - a. Lower Threshold: Set a low value
 - b. Upper Threshold: Set a high value



5.11. Map Chart

A Map chart allows users to position their data in a geographical context using different data layers. Users can create a view based on the selected dimensions/measures that represents data in the region. The represented region will be colored based on the data. Users have the provisions to change the visualization.

Best Situation to Use Map:

To represent any information in geographical context.

Examples:

Unemployment rate in geographical context of the Asia.

Chart Properties:

- i) Range
 - a. Dynamic Range: Enable or disable the dynamic range.
 - b. Min Color
 - c. Max Color
- ii) Region
 - a. Select Map: Select a region using the drop-down menu.

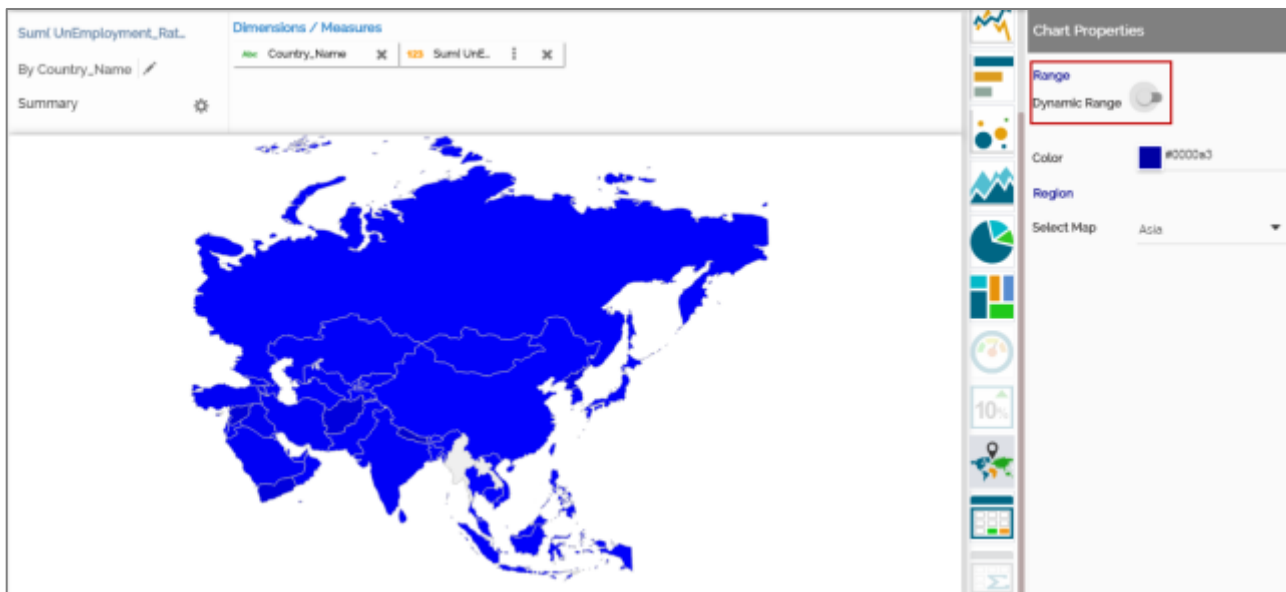


Note:

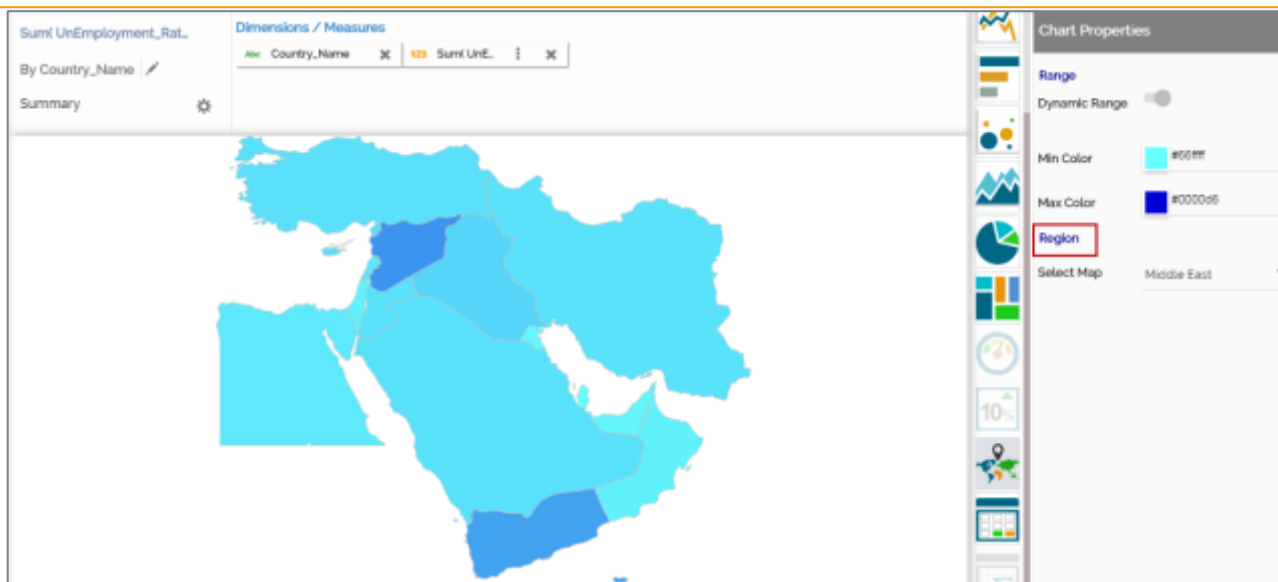
- c. By disabling the dynamic range, map will redraw with the selected 'Max Color'. User can change the color by clicking 'Color' option.
 - i. Selected Max color for the below given Asia Map chart is blue (when dynamic range is enabled).



- ii. Disable the dynamic range.
- iii. The entire map will be drawn in the selected Max color (by default).



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



5.12. Data Grid

Users can see data in tabular format by selecting the data grid option from the view menu bar. Multiple values can be displayed via this view form.

Chart Properties:

- i) General Settings
 - a. **Order:** Users can order the displayed data by selecting an option from the given choices:
 - i. Ascending,
 - ii. Descending
 - iii. None.
 - iv. Users can also apply 'Order By' option on the selected Dimensions or Measures to display the selected order.
 - b. **Font Size:** Select a font size out the given choices.
 - c. **Font Style:** Select a font style out of the given choices.
 - d. **Font Color:** Select a font color using the menu.
 - e. **Background Color:** Select a background color using the menu.

Business Story: Design New

MySQL_DS_01

Search Dimensions / Measures

Sum(PROFIT)

By COMP_ID

Summary

Dimensions / Measures

COMP_ID, OUTLET_NAME, CITY_NAME, SALE_DATE, Sum(PROFIT), Sum(LOSS)

Comp_id	Outlet_name	City_name	Sale_date	Sum(PROFIT)	Sum(LOSS)
ADE850	ADISHWAR	BANGALORE	2001	5.60K	1.20K
BT10802	BATA SHOES	BANGALORE	2001	90.00K	0.00
HP09800	HP LAPTOPS	BANGALORE	2001	1.40K	11.00K
HT3150	HOME TOWN	BANGALORE	2001	1.30K	2.30K
JIN2134	JINDAL STEEL	HYDERABAD	2002	-5.00K	0.00
MM8723	MICROMAX LAPTOPS	NOIDA	2001	0.00	0.00
PH09070	PHILIPS ELECTRONICS	BANGALORE	2001	80.00	1.30K
PIE0000	PIE	BANGALORE	2001	5.60K	5.70K
RLD9870	RELIANCE DIGITAL	BANGALORE	2001	2.30K	78.00K
SL08700	SREE LEATHERS	RATNA	2001	10.00K	5.60K

Chart Properties

General Settings

Order: [radio buttons]

Font Size: [radio buttons]

Font Style: [radio buttons]

Font Color: [dropdown]

Background Color: [dropdown]

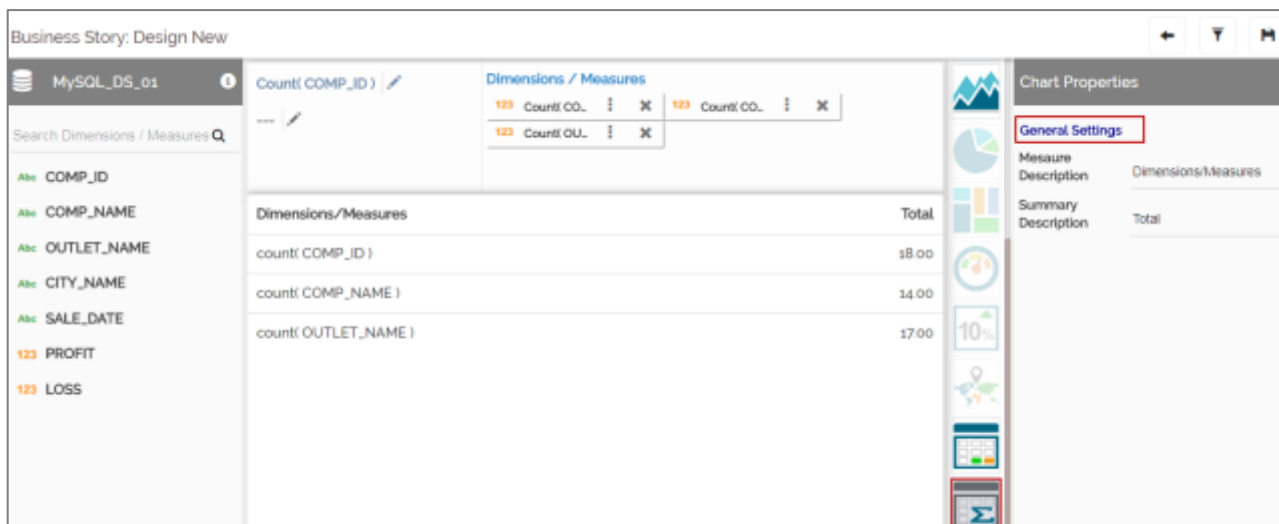
Note: Users will be redirected to pop-up color menu by clicking on Font Color or Background Color option.

5.13. Metric Summary

The Metric Summary will display the measure wise summary. Users can select any number of dimension and measures to display the metric summary.

Chart Properties:

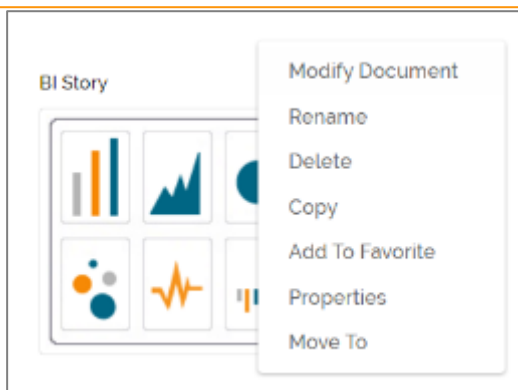
- i) General Settings
 - a. Measure Description: Provide heading for the selected dimensions or measures column.
 - b. Summary Description: Provide heading for the displayed summary column.




6. Options

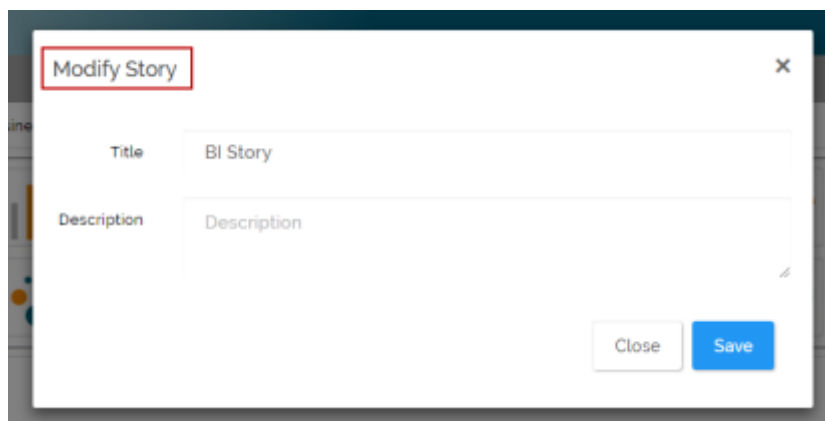
A story created under 'My Documents' or 'Public Documents' is credited with various options. This section describes all the options assigned to a Business Story document.

- i) Navigate to 'My Documents' or 'Public Documents'.
- ii) Select a story document.
- iii) Click the 'Settings' icon
- iv) A context menu opens with the following options:




6.1. Modifying a Document

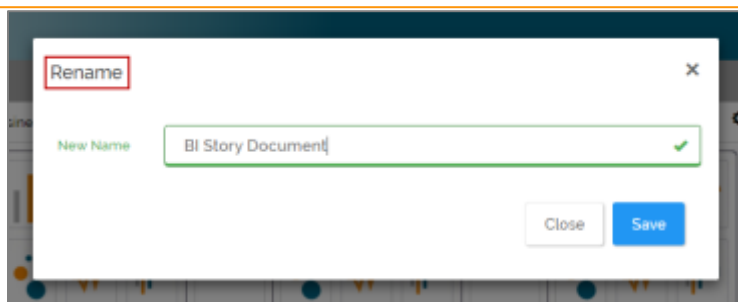
- i) Select a story document.
- ii) Click 'Settings'  for options.
- iii) Select 'Modify Document'.
- iv) A new window will pop-up.
- v) Modify the following information:
 - a. Title: Enter a title for the Business Story
 - b. Description: Describe about the story (Optional)
- vi) Click 'Save'.



- vii) The information will be modified.

6.2. Renaming a Story Document


- i) Select a story document.
- ii) Click 'Settings'  for options.
- iii) Select 'Rename'.
- iv) A new window will pop-up.
- v) Enter 'New Name' for the story document.
- vi) Click 'Save'.

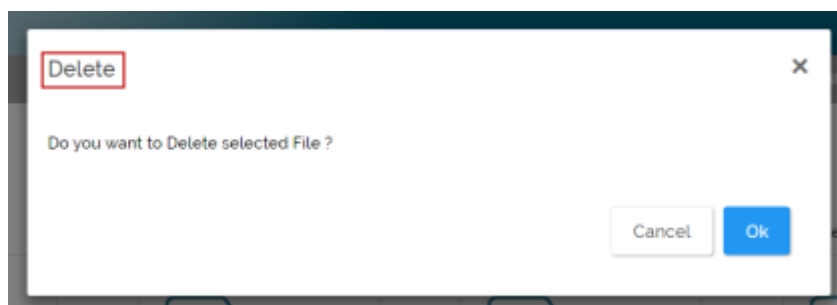


vii) The story document name will be changed successfully.



6.3. Deleting a Business Story

- i) Select a story document
- ii) Click 'Settings'  for options
- iii) Select 'Delete'
- iv) A new window will pop-up to assure the deletion
- v) Click 'OK'




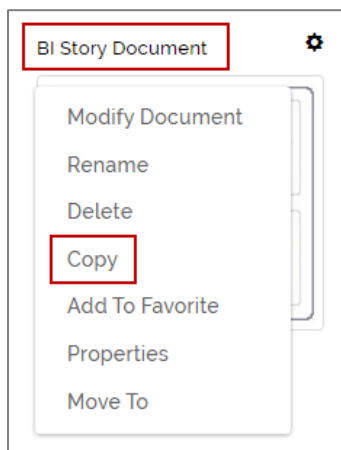
vi) The selected story document will be removed.


Note: 'Delete' option is not provided to the story documents created or shared as the Public Documents.

6.4. Copying and Moving a Business Story

Users can copy a business story document and paste it to the selected place from the BizViz Platform.

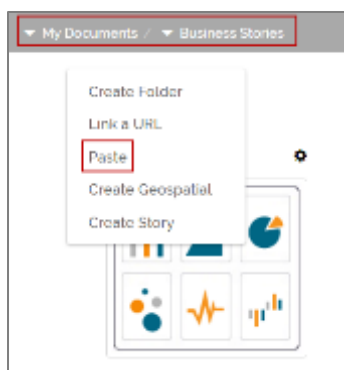
- i) Select a story document.
- ii) Click 'Settings'  for options.
- iii) Select 'Copy'.



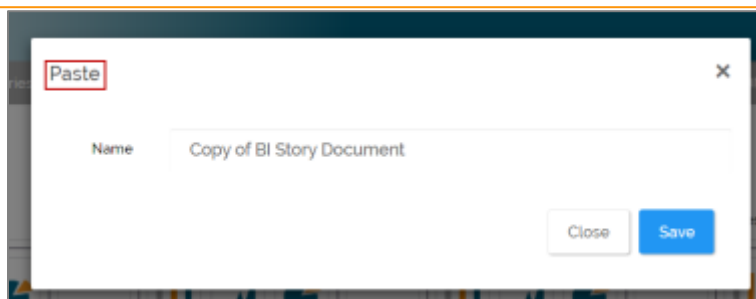
- iv) Select another folder and click the 'Settings' icon .
Or

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 new window pops-up.
- viii) The **Name** mentioned in the pop-up window shows prefix 'Copy of-' before the original name of the story document (E.g. *BI Story Document* will have a new name *Copy of BI Story Document*).
- ix) Click 'Save'.




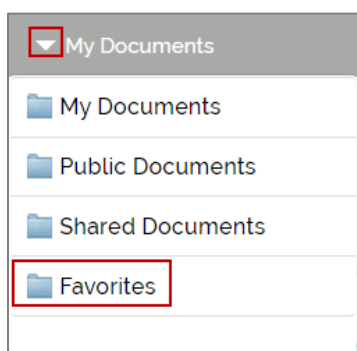
- x) A message pops-up to assure that the copied story document has been posted successfully with a different name.
E.g. the following image shows that *BI Story Document* is named *Copy of BI Story Document* and has been copied to the '**Business Stories**' folder under '**My Documents**'.



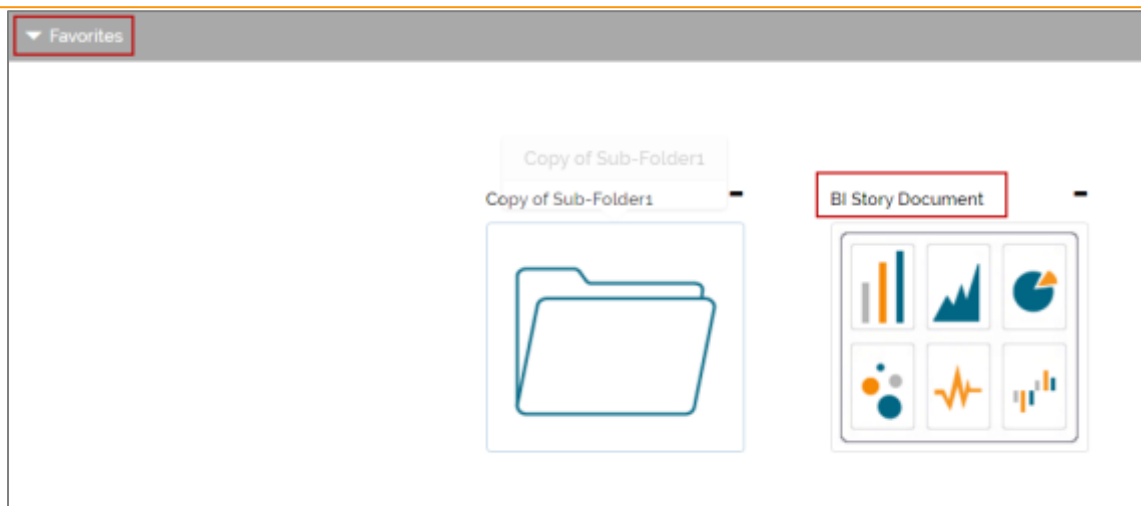
6.5. Adding/Removing a Story Document to/from Favorites


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

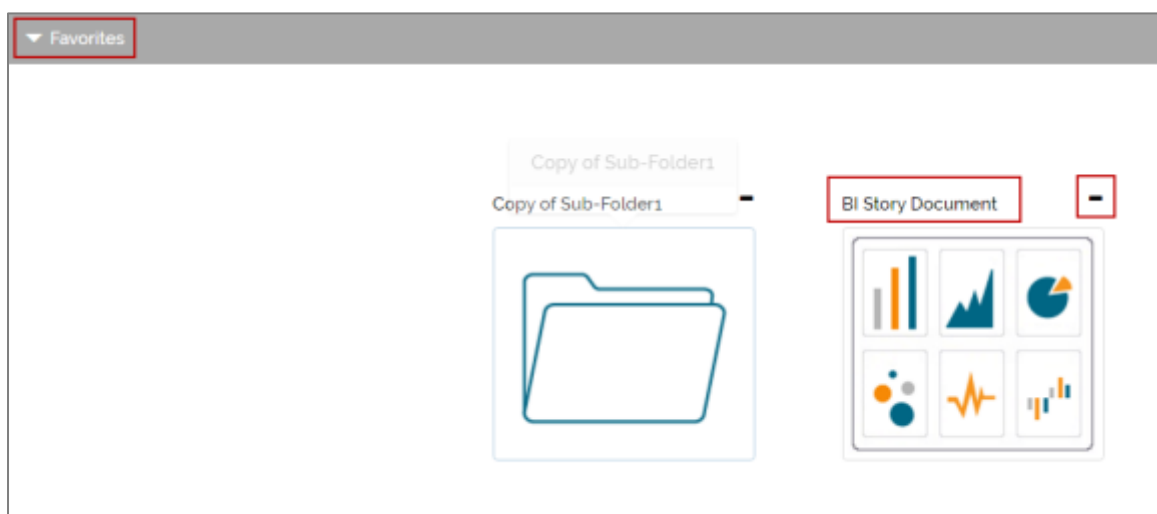
- i) Select a story document
- ii) Click '**Settings**'  for options
- iii) Select 'Add to Favorite'
- iv) A new message pops-up, "Document added to Favorites".
- v) Open '**Favorites**' using the '**My Document**' drop-down menu.



- vi) The selected story document will be added to '**Favorites**'.




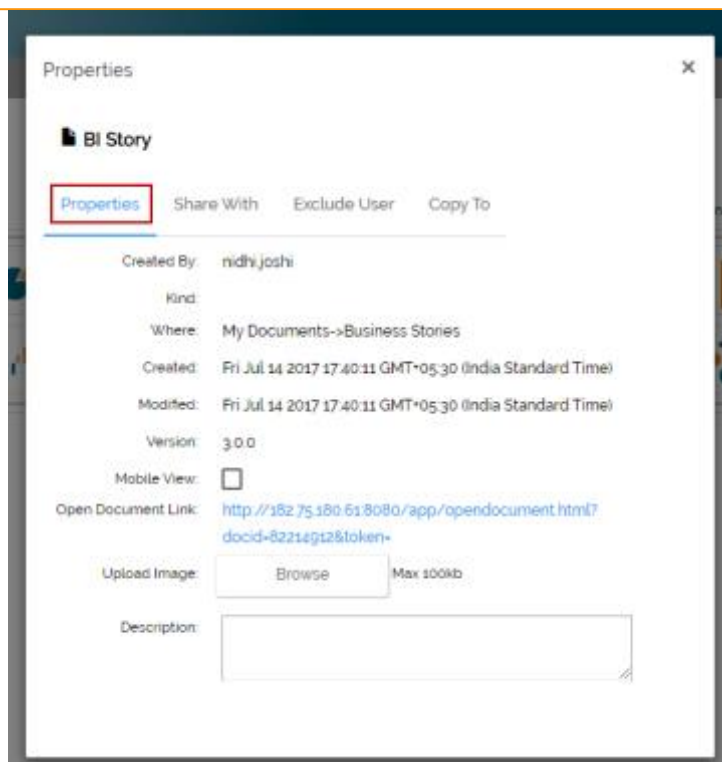
- vii) Click the 'Remove' button  provided on the story document that has been added to 'Favorites'.



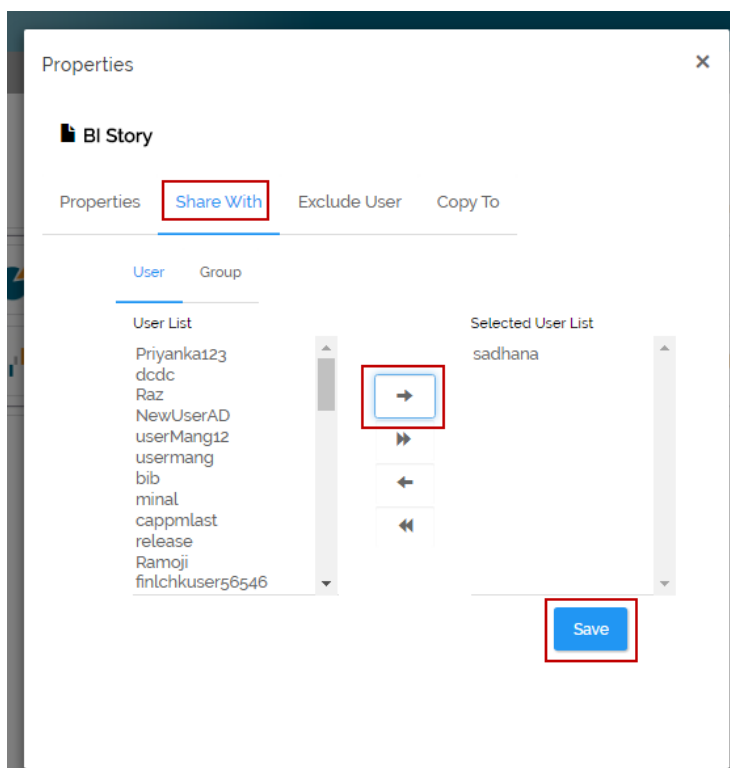
- viii) A new message pops-up, "Document removed successfully!"
- ix) The selected story document will be removed from 'Favorites'.

6.6. Properties

- i) Select a story document.
- ii) Click 'Settings'  for options.
- iii) Select 'Properties'.
- iv) A new screen pops-up with 4 options.
 - a. **Properties:** Business Story properties will be displayed.



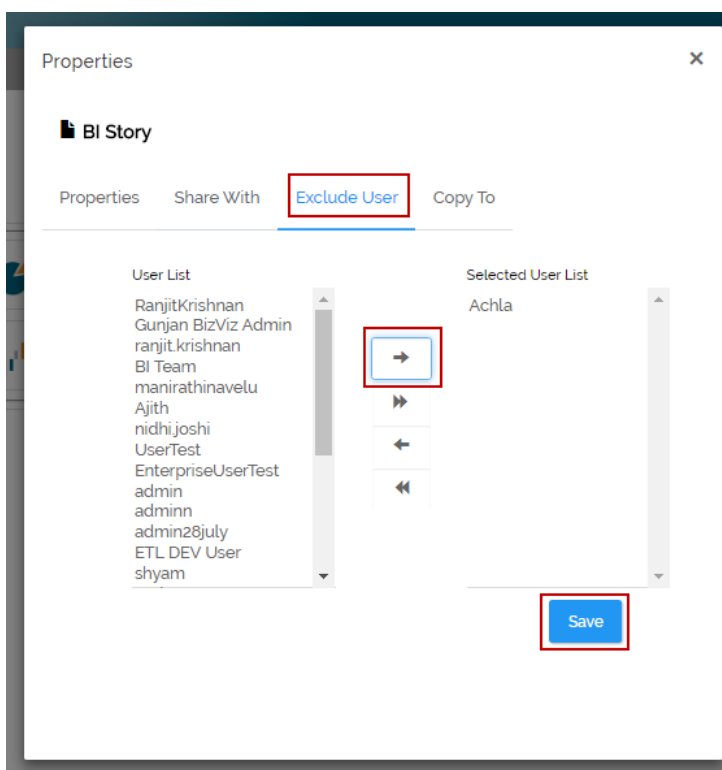
- b. **Share With:** The story document will be shared with the selected user or user group.
1. Select '**Share With**' on the Properties pop-up screen.
 2. Select a user or group from either the '**User List**' or '**Group List**'.
 3. Move the selected user or group to the '**Selected User List**'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



- The story document will be shared with the selected user or selected user group.

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

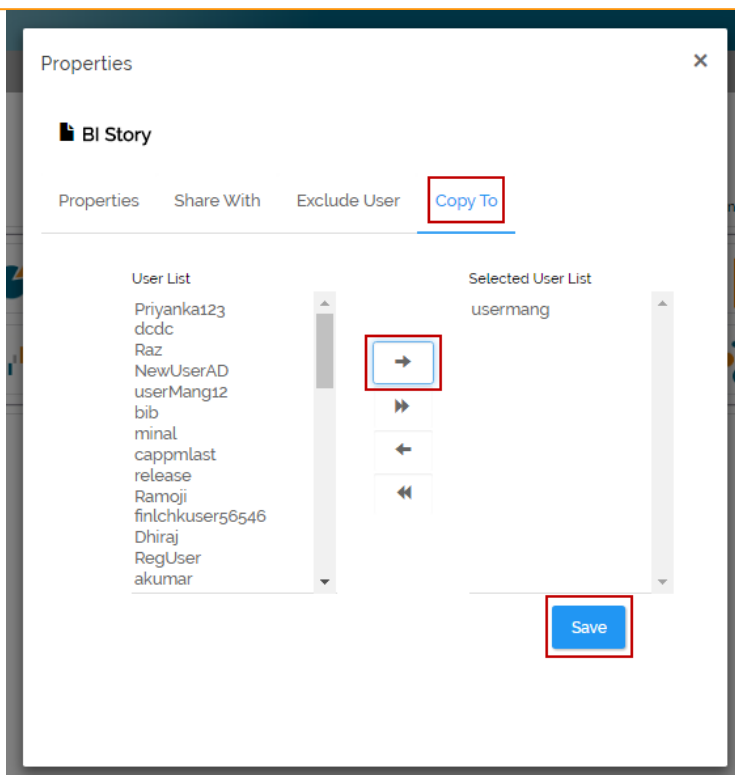
- Exclude User: The selected user will not be able to access the story document.**
 - Select 'Exclude User' on the Properties pop-up screen
 - Select and move users from 'User List' to 'Selected User List' using the arrows
 - Click 'Save'.



- The selected user will be unable to access the story document.

- Copy to: A copy of the story document will be created and shared to the selected users.**



- Select 'Copy To' from the Properties pop-up screen.
- Select and move a user from 'User List' to 'Selected User List'.
- Click 'Save'.

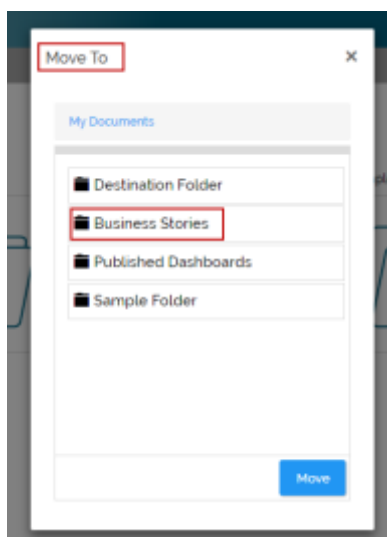


4. A copy of the story document will be shared to the selected user.

Note: If a story document is shared using this option, then the selected users will have right to modify the received document.

6.7. Move To

- i) Select a story document.
- ii) Click '**Settings**'  for options.
- iii) Select '**Move To**'
- iv) A new screen pops-up with available folder options.
- v) Select a folder or sub-folder.
(Click on  button to open a list of available sub-folders)
- vi) Click the '**Move**' button.




vii) The story will be moved to the selected folder or sub-folder.

Note: 'Move To' option is not provided to the story documents created or shared as the Public Documents.

7. Signing Out

It is possible for a user to log out from the business story at any given stage.

Follow the below-given steps 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 of the **BizViz Platform**.

Note: Clicking on 'Sign Out' will redirect the user back to the login page of the BizViz platform.