

BizViz Administrator Guide

BizViz Platform

Release: 2.5

Date: Nov. 9, 2016

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1. About this Guide

1.1. Document History

Product Version	Date (Release date)	Description	
BizViz Platform 1.0	June, 2015	First Release of the document	
BizViz Platform 2.0	February, 2016	Updated document	
BizViz Platform 2.1	May 11 th , 2016	Updated document	
BizViz Platform 2.5	Nov 9 th , 2016	Updated document	

1.2. Overview

This guide covers:

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

1.3. Target Audience

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

2. Introduction

2.1. Introducing the BizViz Platform

BizViz is a unique BI platform that was built to give users better knowledge and insight into their business. It has multiple Big Data connectors that make it both unique and interesting tool. It allows one to create a web service using a database connection. The created web service can then be utilized by the integrated dashboard designer. It enables users to provide Descriptive, Diagnostic, Predictive, and Prescriptive analytics in the cloud, on mobile devices, and on premise.



Larger customers having multiple branches can easily manage data by creating a single space for each branch within this platform. However, they can also view the information collected from multiple branches via dashboards.

2.2. Prerequisites and Supported Devices

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

3. Architectural Overview

The 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 BizViz Platform

4.1. Accessing the BizViz Platform

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

- i) Open BizViz Enterprise Platform Link: <u>http://apps.bdbizviz.com/app/</u>
- ii) Enter your credentials to Login.
- iii) Click 'LOGIN'.

Welcome to BizViz Technologies	BIZVIZ
Email Password	
Enterprise	BizViz Analytics Platform Self-Service BI(Business Story) Predictive Analytics
LOGIN Forgot your password?	 Dashboard Designer Social Media Browser Sentiment Analytics
Copyright © 2015-2016 Big Data BizViz (BizViz technologies Pvt. Ltd.)	• Survey

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



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4.2. BizViz Platform Home Page

The BizViz 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. Menu Row

The Menu Row displays the logged in '**user name**' and various menus.

The menu row contains the following menus:

- Help Menu: Provides access to the help documents
- Home Menu: Redirects to the BizViz Platform Home Page
- My Account Menu: User can edit basic information, set preferences, change password, set API token access and mobile device access
- Logout: User can logout from the Platform
- Plugin Menu: Provides access to various management options and installed applications.

4.2.2. Available Documents

The Home page displays the following:

• My Documents

- \circ 'My Documents' lists all the documents created by the user or assigned to the user.
- \circ The documents are displayed as thumbnails.

• Public Documents

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• The Public Document folder is available to all users.

o Users can view documents shared by others.

• Favorites

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

4.2.3. Displaying and Ordering Documents

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

• Search Box: 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 letters "**CBA**" in the title:



• List Panel: Click 'List' 🔳 icon to display all the documents in the tree structure.



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• Grid Panel: Click 'Grid' III icon to display all the documents in a grid view (the default view to display platform documents).

usiness Visualiza Analytics Pl	tation BizViz						🖲 Help	# Home	L My account		
My Documents	C Public Documents	🕑 Favorites						Search		× 🗉 🎟	2
My Documents / I	Business Story										-12
	Loan Outstanding	0	Retail Sales	0	Webinar HC	0	Legal Services		0		
	1000 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1	·		- <u></u>	- ·-··	·	The second second	· · · · · · ·	0		E
			111 🔺 🛍	iii 🗛	1	1.1 1					÷
		77			Real Inc. House Inc.	10-11-1 11-	-	The second	***		
	hadal	I.,	- III Im	In .	A A kut			ill ale			
	States Statestical V										
	School Story	•	My Retail Story	0	WT Cafe	0	WT Cafe 2		0		06
	and the second second						in the	Hart Hart Hart	12		-
				here				04			
	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1			IIIII I				ALL			
		111		111			Lade 1	h. 🔥			
	(And a second second				Contraction of the local distance				

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

🔁 Help	🔒 Home	L My account	<mark>ሮ</mark> Logout	≡	E
	Search	:	× 🗉 i	1 A]
		41 0	rder By: None		
					5

- ii) A context menu opens.
- iii) Select the desired sort option from the menu list.Ex. Date and Ascending are selected as shown in the following image.

	Name
	Date
	Custom
	OAscending
	ODescending
1.5	

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iv) The platform documents will be sorted as per the selected order.



Note: The documents saved under **'My Documents'** are displayed by default on the Platform home page.

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 Plug-In

- i) Navigate to the Platform home page.
- ii) Click '**Menu**' 🗮 button.
- iii) A list containing all the plugins will be displayed.
- iv) Select 'Administration' plugin from the list.

•	Administration					
<u></u>	User Management					
	Data Management					
÷	Dashboard Designer					
	Survey					
ନ୍	Sentiment Analyzer					
	Report					
ft ing⁺	E Social Media Browser					
More More						
	Report Social Media Browser More					

- v) Users will be redirected to a new page containing a list of the administration options.
- vi) The administration options that contain more than one sub-categories are listed with

the 'Expand' + sign.

Administration	Administration
Document Management	The Administration area to used
Configuration and Settings 🕂	to configure and administer your account.
Document Migration Settings	
Schedule Monitoring Settings	
Authentication +	
Sessions	

vii) '**Collapse**' **sign** indicates that all the sub-categories of that admin option are listed below.

Administration	
Document Management	
Configuration and Settings	+
Document Migration Settings	
Schedule Monitoring Settings	
Authentication	-
AD Configuration	
CA Configuration	
Sessions	

5.2. Administration Options

Configuration settings for the various platform plugins are covered here.

5.2.1. Document Management

This feature allows an administrator to view all the documents created by users that the she/he is administering. The Document Management tile will be displayed in the Administration module.

- i) Navigate to the Administration page.
- ii) Click 'Document Management' from the list of admin options.
- iii) Select a user from the 'Users' list.
- iv) A list of documents created by that user will be displayed.

			Business Visualization Decision Platform
Administration 1	Users T	Documents	
Document Management 🛛 2	Search UWkewing 78 of 78 Q	Search Document	Viewing 3 of 3 Q
Configuration and Settings	wttest 🚯	Achla_Story_3	× C
Document Migration Settings	user test	Achla user wt cafe 3	X (3
Schedule Monitoring Settings	SJ		
Authentication	- pademo	Achla	Ø C
AD Configuration	Raghvendra Singh		
CA Configuration	Admineigsddcasd		
Sessions	Admin		

Note: Other related options provided for the user documents on the 'Document Management' page:

Icon	Name	Description
<>	Exclude from This Document	Excludes user from the document
6	Share Document	Shares the document using 'Share
		With' option provided under
		Properties
×	Delete Document	Removes the document from the
		list

5.2.2. Configurations and Settings

This section covers configuration details for various platform plugins.

5.2.2.1. Email Settings

- a. Navigate to the Administration page.
- b. Click 'Configuration and Settings' from the Admin options list.
- c. Various configuration options will be listed below.
- d. Click 'Email Settings' from the list.
- e. Click 'Edit'.
- f. Fill in the following information:
 - **SMTP Host**: SMTP host address
 - SMTP Port: Port number of SMTP
 - Encryption Type: Select an option from the drop-down menu

C

• 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 settings.
- h. Click 'Clear' to erase the entered configuration details.

SMTP Host	smtp.emailsrvr.com	
SMTP Port	25	
Encryption Type	Select Any One	
From	projectadmin@bdbizviz.com	
Password		
User Name	projectadmin@bdbizviz.com	

5.2.2.2. Password

- a. Click 'Password' from the 'Configuration and Settings' sub-menu.
- b. Click 'Edit'.
- c. Fill in the required information:
 - Password Expiry: Set password validity (in days)
 - Password Strength: Set password length (6 to 16)
 - User Password Reuse: Set a limit to restrict the user from using an old password (last 3 passwords can't be reused)
 - 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)
- d. Click 'Save' to save the settings.
- e. Click 'Clear' to erase the entered configuration details.

Business Visualization

Password Settir	ıgs	
Password Expiry(Days)	1000	-
Password Strength (Characters)	9	-
Password Reuse	4	_
Login Failures (before account is locked)	5	-
		Clear

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.

(C)

- b. Select '**On**' or '**Off**' option by using the ON/Off button.
- c. Click 'Save'.



General Settings	
On Off	
Info Debug Error	

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

• DB Configuration Settings

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

There are 2 ways to configure data base settings:

- a. Default
 - i. Select 'Default'.
 - ii. Click 'Save'.

DBConfiguration Settings		
	Cancel	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:
 - At Host
 - At Port
 - At UserName
 - Change Password
 - At DB Name
 - At DB Type
- iii. Click 'Save'.

		Business Visualization Decision Platform
DBConfiguration Se	ettings	
🔿 Default 🧿 Custom		
At Host	At Host	A
At Port	At Port	
At UserName	At User Name	
Change Password		
At DBName	At DBName	
At DBType	At DBType	
		Cancel 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

This section includes two options:

• Data Service

This option displays a list of all the available Data Connectors with set value for maximum fetch size.

- a. Click 'Edit'.
- b. Select a data service from the list.
- c. Set/Re-set 'Maximum Fetch Size' value.
- d. Click 'Save'.

Data Service Data Store		
Туре	Max Fetch Size	
MySQL	70000	
MSSQL	7000	
Oracle	7000	
Hive	7000	
SAP Hana	7000	
Cassandra	7000	
OData	5000	
Spark SQL	7000	
File	7000	
Red Shift	7000	
		Clear

• Data Store

This option displays maximum fetch size for all the Data Connectors.

- a. Click 'Edit'.
- b. Set/Re-set 'Maximum Fetch Size' value for all data connector.
- c. Click 'Save'.

Data Service	Data Store		
	Туре	Max Fetch Size	
All Da	ta Connector	14000000	
			Clear Sav

5.2.2.5. Geospatial Settings

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

• Google Settings

- a. Click 'Edit'.
- b. 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 'Save'.

Google Settin	ngs		
Мар Туре	google		
Мар Кеу	AlzaSyCSCCdlcd_fSVuLRsqJLCAW5XfVhd		
	Clear Save		

- Leaflet Settings
 - a. Click 'Edit'.
 - b. Fill in the following information:
 - c. Map Type: It will be preselected
 - d. **Map Url:** URL of the selected map (provided by the open-source vendors)
 - e. **Attribution:** Configuration parameters for the map (provided by the open-source vendor)
 - f. Click 'Save'.

Business Visualization	
Decision Platform	612112

Leaflet Settir	ngs
Мар Туре	leaflet
Map Url	http://{s}.tile.osm.org/{z}/{x}/{y}.png
Attribution	© <a hreds<="" th="">
	Clear

- Uploading a Geo Shape File
 - a. Click 'Add' + button provided next to the 'Geometry Type'.

Geometry Type	Polygon	*	+

- 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
 - iii. Shape File: Navigate to file location and select the file (Only 'json' and 'js' format is supported)
- d. Upload the selected 'Shape File'.
- e. Click 'Save'.

		Business Visualizatio Decision Platfor
Upload GeoShapeFile		
Name	India	<u> </u>
Geometry Type	Polygon	~~~
Агеа Туре	Country	
Shape File	India.Geo.Jøon	
		Cancel Save

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

• Deleting a Geo Shape File

- a. The uploaded Geo Shape file will be added into the list and displayed at the bottom of the window.
- b. Click '**Delete**' provided next to a Geo Shape File.

Show 10 - entries	Search: India
Name	¢
INDIA	3
India	3
India	8

c. A pop-up window will appear to confirm the deletion.

d. Select 'Yes'.

Delete shape file		×
Do you want to delete selected shape file ?		
	Cancel	Yes

C

e. The selected file 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.

- Steps to Create a New R-Server
 - a. Click 'Predictive Settings'.
 - b. Click 'Add' button ⁺ provided for R-Server Configuration.
 - c. R-Server configuration fields will be displayed.
 - d. Click 'Edit'.
 - e. 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 user name to log in to the R- server
 - iv. Password: Enter the password for the above user name
 - v. Set as Default: Select this option by using a tick mark in the check box
 - f. Click on 'Save'.

R Servers +		
		← Back
R-Server Configuration		
IP Address	IP Address	
Port	Port	
User Name	User Name	
Password	Password	
Set As Default		
		Clear Save

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

• Editing the R-Server Details

- a. Click '**Back**' provided on the R Server Configuration window.
- b. Users will be redirected to a new window.
- c. A list of all the created R-Servers will be displayed.
- d. Click 'Test' to test the created R-Server connection.

- e. **Max. Scheduled Parallel Process**: Enter a number that refers to the maximum scheduled jobs running parallel in the Predictive Analysis.
- f. Click 'Apply' to save and apply the settings.

R Servers	+				
	0 192.168.1.17		× ×		
	Maximum Scheduled Parallel Processes	3			
			Clear	Test	Apply

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. Click '**Back**' option to leave the R-Server Configuration window. The user will be redirected to a new window showing a list of all the created R-Servers.
- d. 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 'Predictive Spark App Settings' fields will be displayed.
- c. Click 'Edit' provided for the Predictive Spark App Settings fields.
- d. Provide the following information:
 - i. Host
 - ii. Port
 - iii. Application



- iv. Protocol
- v. User Name
- vi. Password
- e. Click 'Test' to check the connection.
- f. A pop-up message will appear to assure about the connection.
- g. Click 'Save'.

Predictive Spark	App Settings
Host	192.168.1.17
Port	18786
Application	ра
Protocol	
User Name	pauser
Password	••••••
	Clear Test Save

5.2.2.7. SMB Server Configuration

This section covers Social Media Browser settings.

- a. Click 'SMB Server Configuration' from the 'Configuration and Settings' list.
- b. The 'Social Media Browser Configuration' fields will be displayed.
- c. Click 'Edit'.
- d. Provide the following information:
 - vii. Host
 - viii. Port
 - ix. Application
 - x. Protocol
 - xi. User Name
 - xii. Password

- e. Click 'Save'.
- f. A pop-up message will appear to assure that the connection has been saved.

		🗡 E dit
Social Media Browser Co	nfiguration	
Host	192.168.1.17	
Port	8080	
Application	smb-war	
Protocol		
User Name	SMB	
Password	••••••	
		Clear Save

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 'Edit'.
- d. Enter the CDN user key in the given space.
- e. Click 'Save'.

CDN User Key C	onfiguration		
CDN USER KEY	te2323		
		Clear	Save

Note: Click 'Clear' to erase the entered information.

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5.2.3. Document Migration Settings

This section explains step by step process for document migration.

1. Document Migration Login

- i) Select 'Document Migration'.
- 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'.

Welcome to Documen	t Migration	¥Cle
Source Domain Name	• Step 1 Document Migration Login	• Step 4 Selection of Destination
http://127.1.1.0:8080/app/ http://www.bdbizviz.com/app/	1. Enter the 'Source Domain	1. Select any Folder from 'Destination List'.
Email	Name(http://127.1.1.0:8080/app/ or http://www.bdbizviz.com/app/)'.	 Click on 'Create Folder' to Migrate Document into a 'New Folder'.
	2. Enter the 'Username'.	3. Select 'System Documents', if migrated
Password	Enter the 'Password' and click 'Login'.	document should be there.
Enterprise -	• Step 2 Select Source Document	4. Click on 'Migrate' button.
	1. Select Root Folder 'My Documents/Public	Step 5 View History of migration
	Documents/ System Documents' (by default My Documents).	1. Check on 'View History'.
Login	2. Select the required Document.	 Click on the Document Name in list to get more details.

2. Select Source Document

- i) Clicking on 'Login' will display the below given page.
- A list of the available files (source documents) under the Logged-in account will be displayed.



Select Source Document	Logged in as Avin Jain ပို Logout
My Documents Public System Find Dependency	View History
Search	
— 🚞 Retail : WT	
— 🚞 Automobile Industry	
— 🚞 BizViz Samples	
— 🚞 Retail Industry	
— 🚞 HR Analytics	
— 🚞 Healthcare Analytics	
— 🚞 Oil & Gas Industry	
— 🚞 DC Metro Demo	
— 🚞 Legal Services Analytics	
— 🚞 Big Data Plugins	
— 🚞 LB Demo	
— 🚞 Attrition	
— 🚞 СА РРМ	
🛏 🚞 Sports Analytics	

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

3. Steps to Migrate a Document

- i) Select a file from the list of source document (as shown below).
- ii) Click 'Find Dependency' to list the dependent Queries and Data Sources.
- iii) Click the 'Add' 🛨 button.
- iv) A new folder will be created in the destination account.
- v) Click 'Migrate' to transfer the document.

Ay Documents Public System. 2 Find Dependency View History	Dependent Query Services	Dependent Data Sou	irces
Search Select Destination Folder My Documents Publi Syste + Search Search WT_Advanced Analytics WT_Advanced_Analytics Franchise Level My Balassian Search	Overallcustsegment CustomerSegmentAnalysis Total Customers based on segments Franchise Revenue per customer Product Spread based on Fran and segments Overall Franchise Growth Test	WT_Pre_Prod WT_CUSTOMER_FEEDB	GEdst ACK GEdst
	Dashboard Workspaces Ram Workspace Avhi_Workspace 6 doc-mig	Document Name Description	WT - Advanced Analy Description (1) Migrate

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4. View Migration History

- i) Click 'View History'.
- ii) A list of migrated documents will be displayed.
- iii) Select a document from the list.
- iv) Click on the document for more details.

5.2.4. Schedule Monitoring Settings

This section helps the administrator to monitor the scheduled search data connectors.

- i) Select 'Schedule Monitoring Setting'.
- ii) A new window will open with a list of all the scheduled data connectors.
- iii) Search and select a data connector from the 'All Schedulers' list.



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

Schedulers 🔻			
Search Data Store			Viewing2of2 Q
Scheduler Name	Last Updated Date	Recurrence	Status
bi1	1/2/2017, 12:59:07 PM	-	Refresh success 🕂
bi1	1/2/2017, 12:58:57 PM	-	Refresh success 🕂



Note:

- a. Click the '**Start/Stop**' ^(b) button to start the scheduler.
- b. Use 'Filter' 🗾 button to display filtered details for the scheduler.
 - i) Click 'Filter' 🔽 button.
 - ii) A pop-up window will appear.
 - iii) Fill the required information:
 - 1. From Date
 - 2. To Date
 - iv) Click 'Submit'.

)
From Date	03/10/2016		
To Date	31/10/2016		
		Submit	

v) The filtered data will be displayed.

Schedulers 🔻				
Search Data Store			Viewing291ol	f291 Q
Scheduler Name	Last Updated Date 🔺	Recurrence	Status	
Cube 6-9-16	10/4/2016, 1:00:00 AM	11/1/2016, 1:00:00 AM	Scheduler success	+
Type Test	10/4/2016, 10:52:45 AM	-	Refresh success	+
Cube Test 4th Oct	10/4/2016, 11:32:36 AM	-	Refresh success	+
MSSQL 30 sep	10/4/2016, 11:44:00 AM	10/5/2016, 11:44:00 AM	Scheduler success	+
Cube 1 September	10/4/2016, 11:54:00 AM	10/5/2016, 11:54:00 AM	Scheduler success	+
20773	10/4/2016, 11:59:16 AM	-	Refresh success	+

5.2.5. Authentication

This section covers two authentication options.

5.2.5.1. Active Directory Configuration

- a. Click 'AD Configuration' authentication option.
- b. Click 'Edit'.
- c. 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

Active Directory	y Configuration	
Service Account	bizvizsvacct	
Password	•••••	
Host Name	192.168.1.13	
Port	3894	
Domain Name	bdisys.com	
		Clear

- d. Click the '**Synchronize**' Sync option.
- e. A new window will open.
- f. Select a user group using the 'User Group List' drop-down menu.



User Group List	Employees 🗸
	O DnsAdmins
	O DnsUpdateProxy
	employees
	🔘 вовј
	O BizViz
	O adminuser

- g. All the users will be listed under 'User List'.
- h. Select and move users to the 'Selected User List'.
- i. Click 'Save'.
- j. A pop-up message will appear to assure that the user list has been updated.

gunian.kumar		ramaaditya.rupakula
priyanka.s testuser1	→	anees.vinny
rina.kumari vishal.sagar	₩	
diljish.s anoop.ll	+	
allu.thomas nistha.goyal .saumva.iain	*	
saumva.lain		

5.2.5.2. CA PPM Configuration

This section explains how to configure Clarity.

- a. Select the 'CA PPM Configuration' on the Administration home page.
- b. Fill in the required information:
 - i. CA PPM Server: URL details of the Clarity server
 - (E.g. http://dashboards.xyz.com)



ii. User Access NQUERY: Name of the Query that will fetch a list of the

- **Clarity users**
- iii. Click 'Save'.

CA PPM Server	CA PPM Server		
User Access NQUERY	User Access NQUERY		
		Cancel	Save

Note: Click 'Edit' to modify/ change the configuration fields.

5.2.6. Sessions

This is a new administrative module to display active users.

- i) Navigate to the Administration options.
- ii) Click 'Sessions' from the list of Admin options.
- iii) Users will be redirected on the 'Active Sessions' page.
- iv) Click the 'Filter' 🔻 icon.
- v) A new window pops-up providing 2 filter options:
 - Users
 - Admins
- vi) Select any one filter option to launch the list of all the active sessions.
- vii) Select a session from the list by check marking the box.
- viii)Click 'Kill Session' to kill the selected session.

					Bus	sine	ss Visualization
Administration	(Active Sessions	v 0		0		Administration
Document Management		Search Name	Users 🗿	٩	7 🕞 Kill		User Management Data Management
Configuration and Settings	+		Admins		Session	B	Business Apps
Document Migration Settings		User Email		User Name	e	ŕc	Dashboard Designer
Schedule Monitoring Settings		6 ✓ pnayar@anr	nitek.com		pnayar@annitek.com		' Survey
Authentication	+	vaidehi.shar	ran@bdbizviz.com		Vaidehi	ନ	Sentiment Analyzer
Sessions 2		migration@	gmail.com		Migration1		Report
		gyan.prakas	h@bdbizviz.com		Gyan	ft ing	Social Media Browser
						+	More

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 login again in the platform.

6. User Management

When you add a new user, you need to specify personal and login information. This section explains how to create a new User Account.

6.1. User Management Home Page

- i) Select 'User Management' from the plugin menu.
- ii) Users will be redirected to the User Management home page.

User Group	+	Users 🕂 🔻				
Search UserGroup Vie	jearch UserGroup Views 7 out of 7 Q Search User Views 8 or				rs 8 out	of8 Q
All Groups		UesrEE	1	0	×	×
gptest	10	UserB	1	0	×	×
New groupthirty	14	UserA	1	0	×	×
Group prod	1.1	TestA	1	0	×	×
Survey	10	Ram	1	0	×	×
Testing	1 0	Achla Nirkhey	1	0	×	×
Viewer Role	10	Devamanohari N	1	0	×	×
Admin Role	10	Ranjit Krishnan Email-ranjit.krishnan@bdbizviz.com	1	0	×	×

Note: 'Search' box is provided to search for a specific User or User Group.



6.2. Creating a New User

i) Click the 'Add' button + provided for creating a new user.

Users: Enterprise	+	₹
-------------------	---	---

- ii) 'New User' window will be displayed.
- iii) Fill in the following information for a new User:
 - a. Email: Email address
 - b. Short Name: Nickname
 - c. Full Name: Full name of the User
 - d. Third Party User: Optional. To be Used when synchronizing a Clarity user with BizViz portal
 - e. Description: Description (note/memo) regarding the user (optional)
 - f. Password: Password to be assigned to the new user
 - g. Confirm Password: Confirm the above password
- iv) Click 'Add' button + to add custom fields.
 - a. Enter Key Enter a parameter category.
 - b. Enter Value Enter a parameter property.

Email	nidhi.joshi@bdbizviz.com	×
Short Name	nidhi	~
Full Name	Nidhi Joshi	~
Third Party User	Third Party User	
Description	Description	
Password	•••••	×
	Good	
Confirm Password		×
	E	

Note: Custom Fields are used to limit user specific data access in the dashboards.

- v) Select a **User Group** from the drop-down menu to add user to a group.
- vi) Click 'Save'.

Platform Users 👻		
Platform		
✓ Platform Users		
MyGroup		
Partners		
BI Testing		
Administrator		
	Cancel	Save
	Platform Users Platform V Platform Users MyGroup Partners BI Testing Administrator	Platform Users Platform Platform Users MyGroup Partners BI Testing Administrator

vii) A pop-up message will appear to assure that a new user has been created. viii) A list containing the newly added user will be displayed (as shown below):

Users 🕂 🍸				
Search User		View	s 6 out o	_{f6} Q
Nidhi Joshi	1	0	×	×
Ranganathan S	1	0	×	×
Kishore Kumar	1	0	×	×
Prakash Joshi Email-prakash.joshi@bdbizviz.com	1	0	×	*
Anoop	1	0	×	*
Avin Jain	1	0	×	×

Options	Name	Description
1	Edit	Edit the user details for a selected user
0	Block	Block the selected user
×	Remove	Remove the selected user from the user list
×	Reset	Reset password for the selected user
-	Password	

6.3. Creating a New User Group

- i) Click the 'Add' button + provided for creating a new User Group.
- ii) 'New Group' window will be displayed.
- iii) Fill in the following information for a new User Group:
 - a. Group Name: Enter a name for the user group
 - b. Description: Describe the user group (optional)
| New Group | | |
|-------------|----------------|---|
| Group Name | Platform Users | |
| Description | Description | |
| | | , |
| | | |

iv) Add users to the new group via the 'Add Users to Group' drop-down menu.

Add Users to Group	
1 Selected 🗸	
Search	
Select All	
🗸 Nidhi Joshi	
🔲 Ranganathan S	
Kishore Kumar	

v) Assign various plugin rights to the User Group via the 'Group Permissions' tree structure menu.

Group	Регг	niss	ions	
þ	V		User Manage	ement
Þ	V		Data Manag	ement
Þ····			GeoSpatial A	analysis
þ			Administrati	on
þ			Business App	ps
þ			Dashboard D)esigner
þ			Predictive A	nalysis
	V		Survey	
			Report	
			Sentiment A	nalyzer
	*		Social Media	Browser

vi) Control access for the group to various menus in the platform via the '**Context Menu Permissions**' tree structure menu.

Group Permissions	Context Menu Permissions
🛃 🜆 Folder	j 🛄 🚛 File

- vii) Click 'Save'.
- viii) A pop-up message will appear to assure that a new group has been created.
- ix) The newly created group will be listed under 'All Groups' list (as shown below):

All Groups		
Platform	1	
Platform Users	1	*
MyGroup	1	~
Partners	1	
BI Testing	1	0
Administrator	1	

Option	Name	Description	
1	Edit	To edit details for the selected user group	
×	Activate	To activate the selected user group	
	Group		
0	Block	To block the selected user group	
	Group		

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 home page.
- ii) Click '**Filter**' **T** button.

			Business Visualizat Decision Platfo	ior orm
User Group	+	Users: Enterprise 🕂 🔻 🔁	↓† Order By:Name	
Search User Group	Viewing 71 of 71 Q	Search User	Viewing 19 of 19	*
All Groups		vinny	× 0 × 0	
Sanity	1 0	USer	× 0 × 0	i i i i i i i i i i i i i i i i i i i
BI Test	1 0	test sanity	× 0 × 3	Ø
Sanity Sep thirteen	1 0	Gyan Prakash	/ 0 × C	ନ୍
PAeightsept	1 0	Testoninethree	/ 0 × C	
BI Group	1 0	abcde Email-abc@def.com	× 0 × C	ft DE
Admin Role	1 0	tesone	/ 0 × C	E
Administratoranoop	1.1	patesttwo	/ 0 × C	0
predone	1 0	Migration	/ 0 × C	
Migration Sep Six	1 0	Abcdef	/ 0 × C	
Survey	1 0	withoutPA	/ 0 × C	
Gp aug	1 0	Vaidehi Sharan	/ 0 × 0	

- iii) A new window will appear with the following options:
 - a. Type: Contains the following authentication types as drop-down options
 - i. Enterprise
 - ii. Windows AD
 - iii. CA PPM
 - b. Status: 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.

• 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 ² to set a new password for an activated user.



Business Visualization Decision Platform

User Group	+	Users: Enterprise 🕂	X	↓† Order By:Na	iame
Search User Group	Viewing 71 of 71 Q	Search User	3 Status Expire	Viewing 76 of 7	76 Q
All Groups		vdguest		🖌	C
Sanity	1 0	guest		6	c
BI Test	1 0	patest		0	C
Sanity Sep thirteen	10	paone		× .	c
PAeightsept	10	Anees Vinny		×	S
BI Group	10	zxderty		V (S
Admin Role	10	prasoon		V (C
Administratoranoop	1.1	Story USer Email-storyuser@	0bdbizviz.com	×	C
predone	/ 0	support		v	S
Migration Sep Six	10	vishal sagar		*	S
Survey	/ 0	testtwofour		v - 1	S

Note: By clicking '**Activate**', an expired user account can be activated and can use the old password. However, when the '**Reset Password**' option has been used, the user will be activated with a new password.

7. Data Management

This section explains how to connect with multiple data bases to create data service and inmemory data store.

i) Select 'Data Management' from the plugin menu list.

ii)Users will be redirected to the Data Management home page.

Data Connector 🔸	Data Service	Cube		
No DataConnector found	Search DataService		Views 0 ou	tofo Q
Search DataConnector	4		No DataService found	

7.1. Creating a Data Connector

- i) Navigate to the Data Management home page.
- ii) Click 'Add' ⁺ provided next to a Data Connector name.
- iii) A list containing names of the available data connectors will be displayed.



iv) Select a connector name from the list.

	+
MySQL	
MSSQL	
Oracle	
Hive	
SAP Hana	
MS Sql Olap	
Cassandra	
Cassandra	
OData	
Spark SQL	

- v) Connector specific fields will be launched on the right pane of the screen.
- vi) *Fill the required information for a New Data Connector: Refer '**Required Fields for the Available Data Connectors**' segment for the details.
- vii) Click 'Test' to check the connection.
- viii) A pop-up message will appear to confirm the connection.
- ix) Click 'Save'.

Following is a sample image displaying required fields for a Data Connector:

Business Visualization Decision Platform

MySQL Data Conne	ctor			
Data connector Name	Data connector Name			
User Name	User Name			
Password	Password			
Description	Description			
IP/Host	IP/Host			
Port	Port			
Database Name	Database Name			
		Cancel	Test	Save

*Required Fields for the Available Data Connectors

1. MySQL

- i) Data Connector Name: A user defined name to identify the data source
- ii) **User Name**: Enter a User Name (It should be the same as given in the connection server)
- iii) **Password:** Enter the Password (It should be the same as given in the connection server)
- iv) Description: Connection Details
- 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 data base where data will be stored

2. MSSQL

- i) Data Connector Name: A user defined name to identify the data source
- ii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
- iii) **Password**: Enter the Password (It should be the same as given in the connection server)

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(C)

- iv) Description: Connection Details
- 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 data base where data will be stored

3. Oracle

- i) Data Connector Name: A user defined name to identify the data source
- ii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
- iii) **Password:** Enter the Password (It should be the same as given in the connection server)
- iv) Description: Connection Details
- 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) **User Name:** Enter a User Name (It should be the same as given in the connection server)
- iii) **Password:** Enter the Password (It should be the same as given in the connection server)
- iv) Description: Connection Details
- 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) **User Name:** Enter a User Name (It should be the same as given in the connection server)
- iii) **Password:** Enter the Password (It should be the same as given in the connection server)
- iv) Description: Connection Details

- v) **IP/ HOST:** Enter database server details (from where the user wants to fetch data)
- vi) **Port:** The server port number

6. MS Sql Olap

- i) Data Connector Name: A user defined name to identify the data source
- ii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
- iii) Password: Enter the Password (It should be the same as given in the connection server)
- iv) Description: Connection Details
- 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 data base where data will be stored

7. Cassandra (JDBC)

- i) Data Connector Name: A user defined name to identify the data source
- ii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
- iii) Password: Enter the Password (It should be the same as given in the connection server)
- iv) Description: Connection Details
- 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 data base where data will be stored

8. O Data

- i) Database Type: Database type in which the data will be stored
- ii) Data Connector Name: A user defined name to identify the data source
- iii) **Description:** Connection Details
- iv) Base Url: Enter Service Root URL or Base URL

9. Spark SQL

(C)

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

10. AWS Redshift

- i) Data Connector Name: A user defined name to identify the data source
- ii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
- iii) **Password:** Enter the password (It should be the same as given in the connection server)
- iv) Description: Connection Details
- 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

11. File

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

File Data Connecto			
Data connector Name	Flat File Dataconnector		
Description	Description		
		li	
			Cancel Save

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7.2. Data Connector List

This section displays a list of all the created data connectors.

i) Navigate to the Data Management home page.

ii) A list containing all the available data connectors will be displayed.

All DataConnector				
WT_CUSTOMER_FEEDBACK	1	С	×	С
Test_native	1	С	×	8
NativeX_BIStory_Connection	1	С	×	е
Spark_connector_UDF	1	С	×	8
SMBSparkSqlNew	1	С	×	e
WT_Pre_Prod_Predictive	1	С	×	8
TestDS	1	c	×	e
WT_Dashboard	1	С	×	8
WT_Predictive	1	С	×	e
test	1	С	×	е
WT_Pre_Prod	1	С	×	e

Option	Name	Task
1	Edit	Edit the connector fields
С	Reconnect	Reconnect with the server
×	Remove	Remove a connector from the list
C	Share	Share connector with the selected user(s) or
	connector	group(s)

Note: Select a connector from the list and hover mouse over the connector name. connector type and host address will be displayed in a pop-up screen.

7.3. Creating a New Data Service

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

- i) Navigate to the Data Management home page.
- ii) 'Data Service' option will be selected by default.
- iii) Select a data connector from the Data Connector list.
- iv) Users will be provided with the 'Create Data Service' + button.
- v) Click 'Create Data Service' + button.
- vi) Users will be redirected to the 'New Data Service' window.
- vii) Fill in the following information for a new Data Service:
 - a. Service Name: Enter any user defined name
 - b. Data Connector Name: Select a data connector from the drop-down menu
 - c. Query: Write query in the given space
 - d. Description: Brief description about data service (It is an optional field)
- viii)Click 'Test' to connect the newly created data service.
- ix) A pop-up message will appear to assure the successful connection.
- x) Click 'Save'.

New Data Service			(+ Help
Service Name	sample	•	
Data Connector Name	Testing Oracle	Ŧ	
Database Name	BIZVIZ		
Query	Select CAFEID,CAFENAME,STATE,ZONE,CITY from MASTER_CAFE		
	*Use Ctrl+Space for assistance		

		Business Visualization Decision Platform
Description	Description	
		<i>L</i>
		Cancel Test Save

xi) The new Data Service will be created and added to the displayed list.

Data	Service	Data Store	+						
Search D	ata Service	2					Vie	ewing 3	of 3 Q
sample	Created By :	Ranjit Krishnan			Ŧ		×	C	۲
oracletest1					Ŧ		×	C	٢
oracle1					Ŧ	1	×	C	٢

Option	Name	Task			
<u>.</u>	Download	Download the data service			
1	Edit	Edit the data service fields			
×	Remove	Remove a data service from the list			
C	Share Data Service	Share/unable a query service to/for the selected user(s) or group(s)			
0	View Link	View the data service link			

Note: Click '**Help**' option to get the rules to be followed when writing a query.

7.4. Creating a New Data Store

This section covers two aspects:

• Accessing 'Create Data Store' Option

- i) Navigate to the Data Management home page.
- ii) Select a **Data Connector** from the Data Connector list.

- iii) Click the 'Data Store' option (on the right side of the screen).
- iv) Users will be provided with the 'Create Cube Service' + button.
- v) Click the '**Create Cube Service**' ⁺ button.
- vi) Users will be redirected to a new window containing the following headers:
 - a. Getting Data
 - b. Hierarchy Definition
 - c. Batch Query
 - d. Data Restrictions
 - e. Schedule Data Refresh

• Creating a Data Store:

This section explains 5 step process to create a new data store.

Step 1- Getting Data: Provide required information to create a data store

- i) Cube Service Name: Enter a name for the in-memory cube
- ii) Data Source Name: It will be preselected (Name of the selected data connector will be displayed in this field)
- iii) Database Name: Enter a data base name from where you want to get data
 Query: Create or edit a query (Use Ctrl + Space for assistance when writing a query service)
- iv) Click 'Next' to proceed on the next tab.

Getting Data	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refre
Cube Service Name	Cafe Data 2K			
Data Source Name	BDI Internal Data			
Database Name	ccd			
Query	SELECT CAFENAME, ST FROM [master_cafe] GROUP BY CAFENAME,S ORDER BY ZONE,STATE	TATE, ZONE, CITY, 'YEAR', INNER JOIN [billcut] ON & STATE,ZONE,CITY,'YEAR'	Sum(BILLCUT) AS BILL(villcut.CAFEID = maste	
	*Use Ctrl+Space for a	assistance		
				Cancel Ne

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Step 2 - Hierarchy Definition: Define hierarchy for various dimension options

i) Click the 'Create Drill Definition' button.



ii) A new 'Drill Def' box will be launched.

Hierarchy Definition	+
Drill Def	×

iii) Drag-drop the required Dimensions into the Drill Def box to define hierarchy.

Getting Data		Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refre
Dimensions		Hierarchy Definitio	n		
CAFENAME	123 🕒				
STATE	123 🕒	Drill Def			×
ZONE	123 🕒	ZONE	× STATE	× _{CITY} ×	
CITY	123 🕒				
Measures					
BILLCUT	Abc 🕒				
Time					
YEAR	Abc 123				
revious					Cancel Nex

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

Note:

- a. Click the 'Add' button ⁺ provided next to the Hierarchy Definition to add a new 'Drill Def' box.
- b. Click the '**Close**' button (from the Drill Def box) to remove the '**Drill Def**' box. It will also remove the defined hierarchy.
- c. Only 'Dimensions' values can be dragged to define hierarchy.
- d. Users can change the categories of a dimension, measure, and time values by clicking the following options:

Options	Description
Abo	Move to Dimensions
123	Move to Measures
G	Move to Time

Step 3 – 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 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.



Getting Data	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refresh
Batch Query		Select Dimension ZONE	•	Generate
		Distinct Query SELECT DISTINCT ZONE FROM [maste master_cafe.CAFEID	er_cafe] INNER JOIN (billcut) ON billcu	t.CAFEID =
		SELECT CAFENAME		Generate Batch Que

Step 4 - Data Restriction: Configure the settings to restrict a user level view

- 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)

Getting Data	Hierarchy Definitior	n Batch Query	Data Restrictions	Schedule Data Refresh
Data Restrictions Data Restrictions allow apply filters to the cube be used to restrict othe accessing unauthorized	users to 2. This can ers from I data	Dimension STATE -	User Property STATE	* *
Previous				Cancel Next

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

Note: The Administrator can restrict data for a specific user via the User Management module or the Data Restriction tab when creating an inmemory data store. However, please note that the conditions in both the User Management module and the Data Restriction tab should match exactly, including the case for the values. (Ex. 'STATE' and 'State' are not exact matches).

Step 5 - Schedule Data Refresh: Use this option to configure data refresh interval

- i) 4 options are provided to refresh the data:
 - a. Daily
 - b. Weekly
 - c. Monthly
 - d. Yearly
- ii) Select any one option to set the data refresh interval.
- iii) Select the '**Refresh Now**' option by using a check mark in the box.
- iv) Data will be refreshed immediately after the cube has been created.
- v) Enable Email Notification by using a check mark in the box.
- vi) Provide the Email Address on which you want the notification email to be sent.
- vii) Click 'Save'.

Data Refresh Schedule Data Refresh allows to rebuild cube inparticular intervals. Data Refresh interval Data Refresh Nowly Vearly Start time 12 * 00 * Refresh Nowl V Note:	Getting Data	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refree
Notification Email Address vimal.m@bdbizviz.cor	Data Refresh Schedule Data Refresh rebuild cube inparticul	allows to ar intervals.	fresh interval Daily Weekly Monthy Every January * 1 The First * Monday * tart time 12 * 00 * fresh Now ✓ If 'Refresh Now' is not select hed until the next scheduled hable Email ✓ btification nail Address vima	of January ed, the cube will not be refresh data & time	

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- viii) A pop-up message will appear to confirm that the data store configuration has been saved.
- ix) Click 'Ok'.



- x) Users will be redirected to the Data Management home page.
- xi) A new data store will be created and added to the displayed list.

	Data Service	Data Store	+						
Sear	ch Data Store Serv	vice					Vie	wing 6	of6 Q
Cafe	e Data 2K				1	6	C	C	×
CCD	Sales				1	6	C	C	×
CCD	Data: Nov 16				1	6	C	C	×
Dev	Test 3				1	6	C	C	×
Dev	Test 2				1	6	C	C	×
Dev	Test 1 Created	By : VIMAL.M2			1	6	C	C	×

Option	Name	Task
1	Edit	Edit the data service fields
6	Latest Scheduler Status	Display the latest scheduler status via a
		pop-up window
C	Refresh Data	Refresh data for a data store



C	Share Data Service	Share/unable a data store to/for the selected user(s) or group(s)
×	Remove	Remove a data store from the list

Note:

- a. 'Getting Data' tab opens by default.
- b. Click '**Back**' ^{Contemportation} to be redirected to the Data Management home page.
- c. Click '**Previous**' to be redirected to the previous page.

7.5. Creating a New Data Store Using a Flat File Data Connector

Step 1- Getting Data

- i) Cube Service Name: Enter a cube service name
- ii) **Data Source Name**: It will be preselected (Name of the selected data connector will be displayed in this field)
- iii) File: Browse the required file using this option
- iv) Click 'Next' to proceed on the next tab.

Getting Data	Hierarchy Definition	Data Restrictions
Cube Service Name	FLN Data	
Data Source Name	File Data	
File	Book11.Xlsx	

Step 2- Hierarchy Definition

i) Click the 'Create Drill Definition' button.

Hierarchy Definition
Hierarchy Definition allow users to select specific values to view its from a new perspective (drill down/in) or to filter for it within a related view (drill across).
Create Drill Definition

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

Hierarchy Definition	+
Drill Def	×

iii) Drag-drop the required Dimensions into the Drill Def box to define hierarchy.

Dimensions			Hierarchy De	finition					
Country	123	©							
Indicator	123	()	Drill Def						×
Population	123	©	Country	×	Population	×	Sum	×	
Sum	123	©							
Measures									
Educated	Abc	©							
NotEducated	Abc	٩							
Revenue 1	Abc	()							
Sample	Abc	©							

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

Step 3- 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).

Getting Data	Hierarch	y Definition		Data Restrictions	a Restrictions		
Data Restrictions	Dimension	Use	Property		+		
Data Restrictions allow users to apply filters to the cube. This can be used to restrict others from accessing unauthorized data	Indicator	• Ind	icator		-		
				Consul	6		

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

Note:

- d. 'Getting Data' tab opens by default.
- e. Click '**Back**' with to get redirected to the Data Management home page.
- f. The Administrator can restrict data for a specific user via the User Management module or the Data Restriction tab when creating an in-memory data store. However, please note that the conditions in both the User Management module and the Data Restriction tab should match exactly, including the case for the values (Ex. 'INDICATOR' and 'Indicator' are not exact matches).
- g. Click 'Previous' to be redirected on the previous page.



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.
 - 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'.

		Business Visualiza Decision Pla
		Logged in as Ranjit Krishnan 🛛 😝 Help
Create Fold	er	×
Name	Test	×
Description	Description	
		Close Save

ix) The folder will be created.

My Documents									\$ Order By: None
Ranjit K	o	Ram	¢	Test_Foldr_Will	o	priya	o	Test	0

• 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.



Sample	Create Folder
	Assign App
	Link a URL
	Rename
	Delete
	Сору
	Add To Favorite
	Create Geospatial
	Create Report
	Properties
	Create Story
	Move To

iii) Select 'Create Folder'.

iv) A pop-up window will appear.

v) Fill in the following information:

- a. Name: Enter a folder name
- b. Description: Describe the folder (optional)

vi) Click 'Save'.

Susiness Visualization		_		Logged in as Avin Jain	O Help	Attome	±.My i	eccount	OLog	pout	=
Etty Documents C Public Docu	Create Fold	er					×		× 8		æ m
	Name	Sub Folder					,				8
	Description	Description									10
	Description										
¢					Close	Save					20 B
			hole come								0
			TUMM								

vii) The (sub) folder will be created.



My Documents / Sample Folder		
	Sub Folder	۰
<		

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

8.1.2. Assigning an App

Users can assign app to a folder by following these steps:

- i) Select a folder.
- ii) Click the **'Settings'** ticon for options.
- iii) Select 'Assign App'.
- iv) A pop-up window will appear.
- v) Fill in the following information:
 - a. Select App: Select an app from the drop-down menu
 - b. App Name: Enter a name for the app
 - c. Description: Description about the app (optional)
 - d. Business App Parameter:
 - i. Click the 'Add' button + to add a Business App Parameter.
 - ii. Click the '**Remove**' button ***** to remove the inserted Business App Parameter.

vi) Click 'Save'.

©_

			B	usiness Visu Decisio	alization n Platform
Analytics Plantane	(m)	Loos	erd in as Asin Jain 🛛 🛛 Helo	Allone Lilly account	OLogout =
Documents C Pul	Assign App			×	E = 2;
	Select App	Retail			
	App Name	Sample Form		×	EP.
	Description	Description			10 18
	Business App Parameter	+		Å	
	User Properties 🖌	User Properties 🗸	Sample Parameters	× ×	> 190
				Close Save	1 <u>11</u>
		TUMM\ES.			

vii) The app will be assigned to the folder.

My Documents / Sample Folder				
	Sub Folder	0	Sample Form	٥
,				

8.1.3. Linking a URL

- i) Select a folder.
- ii) Click the 'Settings' 🍄 icon for options.
- iii) Select 'Link a URL'.
- iv) A pop-up window will appear.
- 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
 - i. Click the 'Add' button + to add a URL Parameter.

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



Rusiness Visualization		Losserd in at Avin Jain O Helo A Home I My account	O Logout	
Thy Documents C Put		×	- a = 4	5
My Documents	URL Name	Sample URI,	4	2
	Type URL	http://apps.lsdbizviz.com/app/opendocument.html?		
	Description	docid=977469498coken=c67237f0031e9aed58c77beea2253550	4	0
			1	h
c	URL Parameter	•	, 2	
User Properties	1	User Properties 🗸 Sample Parameters 🗸	5	
		Close Save	· · · · · · · · · · · · · · · · · · ·	2
		TUMM(ES		

vii) The URL will be linked to the folder.

My Documents / Sample Polder					
	Sub Folder	۰	Sample Form	۰	Sample URL O
					URL
<					

8.1.4. Renaming a Folder

- i) Select a folder.
- ii) Click the 'Settings' 🍄 icon for options.
- iii) Select 'Rename'.
- iv) A pop-up window will appear.
- v) Enter 'New Name' for the folder.
- vi) Click 'Save'.

ly Decuments C Public	Rename				×	 = 2;
	New Name	Sample Fol	der 1		~	1
				Close	Save	
	Dashboards	٥	Wholesome Tummies) 60 15
			Who lecome			0

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vii) The folder will be renamed.

Business Story	•	France Detto	•	084	•
Desthoerts	•	Wholesome Tummies	•	Sample Folder 1	0
		Wheles	es.		

8.1.5. Deleting a Folder

- i) Select a folder.
- ii) Click the 'Settings' 🍄 icon for options.
- iii) Select 'Delete'.
- iv) A pop-up window will appear to assure the deletion.
- v) Click 'Yes'.



vi) The selected folder will be deleted.



(C)

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

8.1.6. Copying a Folder

It is possible to 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'.

Business Visualization Anaptor Parton My Documents C Public My Documents	Paste				×	count OLogout	- 20
	Name	Copy of Sam	nple Folder 1				8
				Close	Save		10 6
¢	Deshivarda	0	wholesome Tummies				> 00
			Wholecome				14 10

- x) A Message pops-up to assure that the copied folder has been pasted 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**'.





(C)

Public Folder								
	Samples	0	smb	•	smithig	•	Copy of Sample	۰
·								

8.1.7. Adding/Removing a Folder to/from Favorites

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'.

Retail Soles - Sample Folder 1 -	Fevorites		
<	¢	Retail Soles	Sample Folder 1

- 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'.

8.1.8. 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 anyone 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'.

Restrees Financiantian and	Create Geospatial		×	Aracanat Olayad =
The Designation	Select GeoSpatial Analysis	Select Any One		
	Display Name	Sample Geospatia	~	
	Description	Description		1
4			Close Size	
	-	unelesome		
		TUMMIES		

vii) The geospatial will be created.

8.1.9. Creating a Report

- i) Select a folder.
- ii) Click the 'Settings' 🍄 icon for options.
- iii) Select 'Create Report'.
- iv) A pop-up window will appear.
- v) Fill in the following information:
 - a. Report Name: Select a report name from the drop-down menu
 - b. Display Name: Enter a name that will be displayed with the report
 - c. Description: Describe the report (optional)
- vi) Click 'Save'.

Enternanterin 2 Poles Desere	Create Report		×	Nyximet Clayed 🚍
	Report Name	All Selected		
	Display Name	Display Name		10 10
	Description	Description		
			Clarke Course	1
	4 (m)	uhelesome	COST -	ē

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vii) The report will be created.

8.1.10. Properties

- i) Select a folder.
- ii) Click the 'Settings' 🍄 icon for options.
- iii) Select 'Properties'.
- iv) The folder properties will be displayed.

		Logged in as Avin Jain 🛛 😯 Help
	Properties	×
	CA PPM Properties	
nobile	Created By:	Avin Jain
	Kind:	Folder
	Where:	My Documents
7	Created:	Mon Jun 27 2016 14:50:58 GMT+05:30 (India Standard Time)
	Modified:	Mon Jun 27 2016 14:50:58 GMT+05:30 (India Standard Time)
	Version:	2.0.1
	Upload Image:	Browse Max 100kb
ncare	Description:	
1	Ж а	

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8.1.11. 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'.

Rusiness Visualization		The second Classes 7	
Analytics Platform	Crasha Shara		
Thy Documents C Public Documents	create story	anth x 🖬 🖬 🖌	6
			88
	Title	Sample Story 🖌	
B-G-R	1		
	Description	Description	
			j
		Close Save	
			8
Central	boards	wholesome Tummles	9
		1	5
	۲	Where some	
			۲

vii) The story document will be created.



8.1.12. 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.

ments / Ranjit K								↓† Order B
MyStory	Story	•	Rak1	•	LoadTest	•	Test	٥
North Carlos								

8.2. Assigning an App

- 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 'Assign App' from the context menu.
- vi) A pop-up window will appear.
- vii) Fill in the following information:
 - a. Select App: Select an app from the drop-down menu
 - b. App Name: Enter a name for the app
 - c. Description: Describe the app (Optional)
 - d. Business App Parameter
 - i. Click the 'Add' button + to add a Business App Parameter
 - ii. Click the '**Remove**' button ***** to remove the inserted Business App Parameter
- viii) Click 'Save'.

August Sector	Assign App		×		
Bit Instant, Chief Descent	12/6 (Star) 50				2
The Designation	Select App	htal	•		-
	App Rate	Senale Form	4		
	Description	Desiription			
					-10
	Builden App Parahatar	•			6
	User Properties 🖉 🖌	User Properties 21 Sample Parameters 21 K			10
(4		Cloue	-		123
	Cadhoarth O with	alexanse Tuteriaes 0			10
					1
		J. Ale come			R
		TUMMES			

ix) The app will be assigned.

Business Story	٥	finance Demo	0	CD-A	۰	Sangia Form	
Q)						
Deskiloards	٥	Whatesame Taxonies	0	Songle Failer	٥		
4 10 M	and a	Whelese	me				

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

8.3. Linking a URL

- 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 'Link a URL'.
- vi) A pop-up window will appear.
- vii) Enter the following information:
 - a. URL Name: Enter a URL name.
 - b. Type URL: Enter a URL link.
 - c. Description: Describe the URL (optional).
 - d. URL Parameter:
 - i. Click the '**Add**' button to add a new URL Parameter.
 - ii. Click the '**Remove**' button 💌 to remove the inserted URL Parameter.
- viii) Click 'Save'.

lization Biz	Viz	Logged in a	ıs Avin Jain	🛿 Help	🔒 Home	👤 My account
B P Link a UF	RL					×
	URL Name	Sample URL)r
	Type URL	URL				*
	Description	http://bdbizviz.co	om/dashboa	rdgallery.html		✓
	URL Parameter	+				
	ser Properties 🗸	User Properties	**	User Properties	*	×
					Close	Save
no 🌣	Financial Servi	\$	Healthcare A	nalytics 🌣	HR Ar	nalytics

ix) The Link URL will be created.


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• Options Assigned to a URL

8.3.1. Viewing a Document

- i) Select a linked URL document.
- ii) Click the 'Settings' 🍄 icon for options.
- iii) Select 'View Document'.
- iv) The linked document will be displayed.



8.3.2. 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**'.

lalizatio Plat ^e	BIZVIZ	Logged in as	Avin Jain	🕄 Help	🔒 Home	L My account
C P	1odify Linked URL					×
	URL Name	Sample URL				
	Type URL	http://bdbizviz.cor	n/whoweare	e.html		
	Description	Description				
	URL Parameter	+				
	User Properties	User Properties	•	User Propertie	s	×
					Close	Save
	Ö Einen del Const	ö ,		- hutina		luster

vii) The modified URL Link will be saved.

8.3.3. 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'.

					Business	Visualization ecision Platform	BizV
nen	Rename		Logged Ir	n as Avin Jain	🤂 Help 👖	Home IMy	
	New Name	Sample URL 1			Close	Save	
\$	Oil & Ga	s Industry	\$	Petail Industry	\$	Sample IIPI	

vii) The URL document will be renamed successfully.

8.3.4. Deleting a URL Document

- i) Select a linked URL document.
- ii) Click the **'Settings'** ticon for options.
- iii) Select 'Delete'.
- iv) A pop-up window will appear to confirm deletion.
- v) Click 'Ok'.

BizV	12	Logged in as Avin Jain	🛿 Help	A Home	L My
cumen	Delete				×
	Do you want to Delete selected File	?			
			Can	cel 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.



8.3.5. 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'.

Susiness Visualization Analytics Platform				Logged in as Avin Jain	O Help	#Home	L My account		
E try Documents C Public Docum	Paste						×	× Ø	= 2.
Hy Documents									-
	Name	Copy of	Sample URL 1						
							_		
						_	_		10
					Close	Sav	re 👘		6
									000
<									2 00
	Deshboards	•	Wholesome Tummles	o 1					12
									0
	400		Whelesome	,					
	<u></u>		TUMMULS						
			-	J.					

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



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8.3.6. 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**'.

8.3.7. 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 4 options.
 - a. **Properties:** Properties of the linked URL documents will be displayed.

Properties		>
Real Time Analys Properties Share	is - Customer Feedback Survey e With Exclude User Copy To	
Created By:	Avin Jain	
Kind:	Link URL	
Where:	My Documents->WT-Retail	
Created:	Fri Mar 25 2016 15:16:27 GMT+05:30 (India Standard Time)	
Modified:	Tue Jun 07 2016 18:49:44 GMT+05:30 (India Standard Time)	
Version:	2.0.1	
Mobile View:		
Open Document Link:	http://app.bdbizviz.com	
	/opendocument.html?docid=4030512&	
	token=E12B6E5E0615BEAAB5095DB89AB36CB23306	
Upload Image:	Browse Max 100kb	
Description:		

- 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'.
 - Move the selected user or group to the 'Selected User List' or 'Selected Group List' using the arrows.



4. Click 'Save'.

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ory	User	Group					
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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.
- c. Copy To: The linked URL document will be copied to the selected users.
 - 1. Select 'Copy To' 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'.

`					
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Ra Ar	ajat 100p		-		
		•	4		
		>		Save	~

- 4. The linked URL document will be copied to the selected user.
- **Note:** If a URL file is shared using this option, then the user will have right to modify it.

8.3.8. 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.

My Documents / Ranjit K / Test		\$\$ Order By: None
	Sample URL 1	

8.4. 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'.

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Hy Documents	Select GeoSpatial Analysis	Select Any One	•		-
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ix) The Geospatial will be created.

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

8.5. Creating a Report

- 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 Report'.
- vi) A pop-up window will appear.
- vii) Fill in the following information:
 - a. Report Name: Select a report name from the drop-down menu.
 - b. Display Name: Enter a name that will be displayed with the report.
 - c. **Description**: Describe the Report (optional).

viii) Click 'Save'.

			Busi	ness Visualization Decision Platform
Rusiness Visualization Augins: Future Ing Decements C Public Documents	Create Report		×	1 My account O Logout 🚍
My Documents	Report Name	All Selected	•	
	Display Name	Display Name		10 40
	Description	Description		6
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			Close Save	90 19 <u>1</u>
		un lesome		î

ix) The report will be created successfully.

8.6. 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'.

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ix) The story document will be created.



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

8.7. 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.



8.7.1. Viewing a Dashboard

This section explains step by step process to view an existing dashboard under '**My Documents**'/ '**Public Documents**'.

- i) Select a dashboard.
- ii) Click the 'Settings' 🍄 icon for options.
- iii) Select 'View Document'.
- iv) The Dashboard screen will be displayed.
- v) The following options will be provided on a dashboard screen to facilitate users:
 - Back: Redirect users back to the selected dashboard.
 - Recent Items: Display the recently opened page.
 - **Comments**: Explain about the dashboard or insert feedback comments. (Please refer '**Steps to Insert a Comment**' provided at the end of this topic to know about this option in detail).
 - Full Screen/ Reduce Size: View the dashboard in full screen or reduce the dashboard screen size.

		Business Visualiza Decision Plat	tion form
🗢 Back 🖉 Recent Items		Comments	12
KPIs by Project Type		Export to PPT Export to PDF	<u></u>
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			Ê
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Project Status Risk, Issues and Change Requests			it re
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Apply Save Preview Saved Filters Reset			

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.

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b. Inserted comments on the dashboard screen display record of Author's initial (E.g. AJ) and time (when the comment was inserted).

8.7.2. 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'.

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Modify Dashboard						×
Dashbo	oard Type HTML5					-
Dashbor	ard Name KPIs by Project	Туре				
Select D	ashboard KPIs By Projec	t Type_grey.Bvzx				
De	escription Published from	dashboard designer				6
Dashboard P	arameter +					
					Close	Save
BS-Resource All	Project Status		BS-Project Overview	, ¢	_	_

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

8.7.3. Renaming a Dashboard

User 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.

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8.7.4. Deleting a Dashboard

- 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'.

		Logged in as Avin Jain	🕄 Help	1
es	Delete		×	
	Do you want to Delete selected File ?	Cancel	Ok	
k Depen				
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vi) The selected dashboard will be deleted.

8.7.5. 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.
- i) Select 'Paste'.
- ii) A pop-up window will appear.
- vii) 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*).
- viii)Click 'Save'.

		Business Visua Decision	lization Platform
Paste		Logged in as Avin Jain	€ Help ×
Name	Copy of KPIs by Project Type		
		Close	iave
			1 () () () () () () () () () (

ix) The selected dashboard will be pasted with a different name.

8.7.6. 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!".

	Logged in as Avin Jain	🛿 Help
s	Add To Favorite	×
	Document added to favorites!	
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v) The selected dashboard will be added to 'Favorites'.



My Documents	C Public Documents	🕑 Favorites	Search	×		
Favorites				↓† Order By	: Custon	n
		KPIs by Project Type				
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		exections and the second secon				

- 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**'.

8.7.7. Properties

- 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.

operates	
<u> </u>	
(Pls by Project Type	
Properties Share With Exclude User Copy Io	
Created By: Avin Jain	
Kind: HTML5	
Where: My Documents->CA PPM	
Created: Thu Jun 30 2016 13:28:01 GMT+05:30 (I	India Standard Time)
Modified: Thu Jun 30 2016 14:49:41 GMT+05:30 (I	India Standard Time)
Version: 2.0.1	
Mobile View:	
Open Document Link: http://app.bdbizviz.com/opendocumen	t.html?
docid=19857423&token=E12B6E5E061	5BEAAB5095DB89AB3
6CB23306	
Upload Image: Browse Max 100kb	
Description: Published from dashboard designer	

- 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'.

Viewer Role Selected Group List BizViz Partners Selected Group List Poweruser Viewer Role	roperties	Logg		
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Group List Selected Group List BizViz Partners Permission Poweruser Viewer Role	User Group			
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		**		
Save		~		-
			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'.

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- a. The selected user will be unable to access the dashboard.
- Copy To: The dashboard will be shared to the selected users.
 - 1. Select 'Copy To' 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'.



a. The dashboard will be copied to the selected user.

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

8.7.8. 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'.

	Logged in as	Avin Jain
	My Documents	
	Automobile Industry	
0	BizViz Samples	am Deta
	💼 Retail Industry	
	HR Analytics	
Terreta de la composición de l	Healthcare Analytics	
4 America (0. 00	Oil & Gas Industry	
	DC Metro Demo	
	■ 10 × A 1.0	1
these 32	Move	: Overvie
** ** **		Br Wron

vii) A success message will appear.

viii) The dashboard will be moved to the selected space.

My Documents CPublic Documents	🕑 Favorites		bizviz	×		
My Documents / BizViz Samples				11 Order I	By: None	e
Lead Source Analysis	Bank Loan Analysis	KPIs by Project Type Image: Comparison of the type of the typ	Supply Chain Ma		•	

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 'My Account' option on the menu row.
- iii) A new window will open with 3 options:
 - a. Information
 - b. Preferences

c. Change Password

Note: Information option window will open 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'.

	Ğ	ldit
Information		
Email		
Full Name		
Mobile Number	MobileNumber	
Land Number	LandNumber	
Address	Address	
		_4
		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:

(C)

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

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 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 displayed.
- 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.

Preferences			
Document Settings			
Select Type	💽 Folder	ODocument	
Folder	Test		•
Theme Settings			
Select Theme	Light Sea Green		•
			Save

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.



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iii) Enter 'Old Password', 'New Password', and 'Confirm Password' (the newly set password).

iv) Click 'Save'.

L Information	* Preferences	Change Password	
Chi	ange Password		
	Old Password	······· ·	_
	New Password	······································	-
		Strong	
c	Confirm Password	······································	-
			Save

v) The password will be changed successfully.

• 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'.

API token access		
Show	02850042	D111111
320919392B8C4729880CF	62DE9645	biiiii
API token created about 10	0 months a	igo.
Mobile device acces	S	
Credential ID		Set
Password Expiry Con	nfigurat	ion
Password Expiry Cor Password Never Expires	nfigurat O	ion

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. You can however modify Enterprise authentication

 $^{\odot}$

settings to meet your organization's security requirements. You can modify Enterprise authentication settings through the administration module.

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 their assigned data.

E.g. everybody should be able to see the platform page, but with their assigned projects and functionalities.

10.4. Mobile

It is an advanced security feature to secure the mobile access of the BizViz application. It requires access to the BizViz server for the first time to register the credentials, user can then easily avail it from the iOS App Store. A time bound security code is generated automatically, after the credentials are registered successfully. To safeguard mobile access and collaboration, the security code keeps on changing. It provides robust security to assure user identity, fraud detection, data protection etc. Mobile device access can be managed from the administrator's My Account segment provided in the BizViz Platform.

Steps to Access and Use Mobile Authentication

- i) Navigate to the platform home page.
- ii) Click '**My Account**'.
- iii) 'Mobile Device Access' will be displayed on the right side of the pane.
- iv) Set a 'Credential ID' from the 'Mobile Device Access' option.

API token access			
Show			
API token created about 8 days ago. Reset			
Mahila davisa assas			
MODILE GEVICE access			
BIZVIZ62553608	*	Set	

- v) Avail the 'BizViz Access' screen in your mobile device (as shown below).
- vi) The set 'Credential ID' will be displayed with a 'Security Code'.

Credential I	כ
BIZVIZ6255	3608
< 12	12:39:06
Security Cod	le
2608	4 1
Business Visuolisation Analytics Platform	BIZVIZ

vii) Navigate to the platform login page.

viii)Select 'Mobile' as an authentication option.

- ix) Enter the user specific email id.
- x) Use the set '**Credential ID**' as password while logging into the BizViz platform.

В	zViz	
Email		
Password		
Mobile		•
	LOGIN	Need help?

11. Logging Out

Click 'Logout' on the menu row of the BizViz Platform. You will be successfully logged out from the BizViz Platform.

Note: Clicking on 'Logout' will redirect the user back to the 'LOGIN' page of the BizViz platform.