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 11th, 2016	Updated document
BizViz Platform 2.5	Nov 9th, 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.

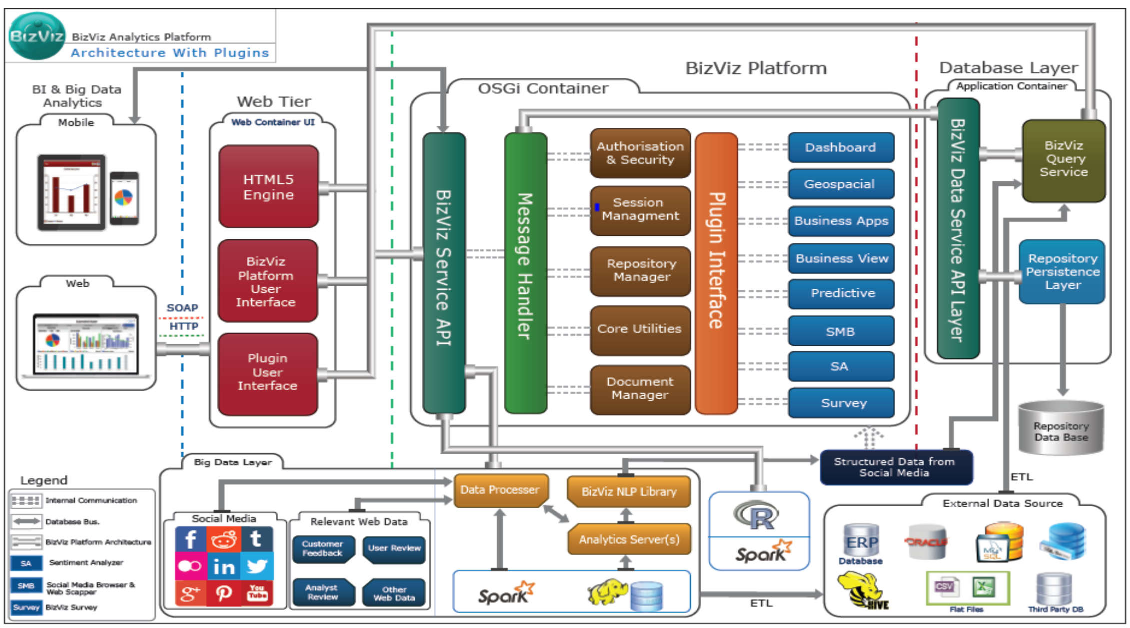
Larger customers having multiple branches can easily manage data by creating a single space for each branch within this platform. However, they can also view the information collected from multiple branches via dashboards.

2.2. Prerequisites and Supported Devices

- Browser that supports HTML5
- Operating System: Windows 7
- 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.

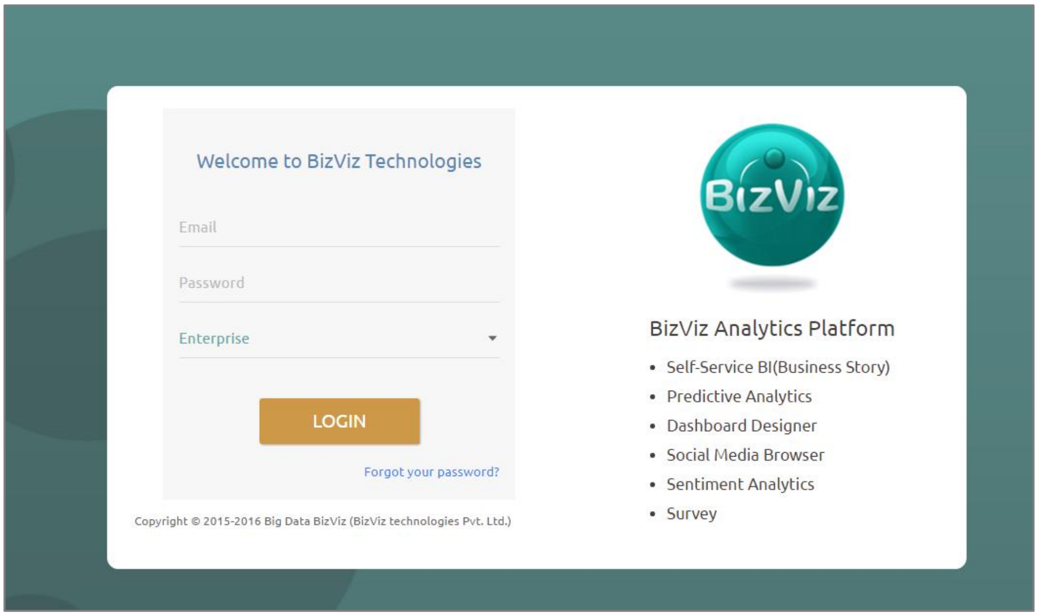


4. Getting Started with the BizViz Platform

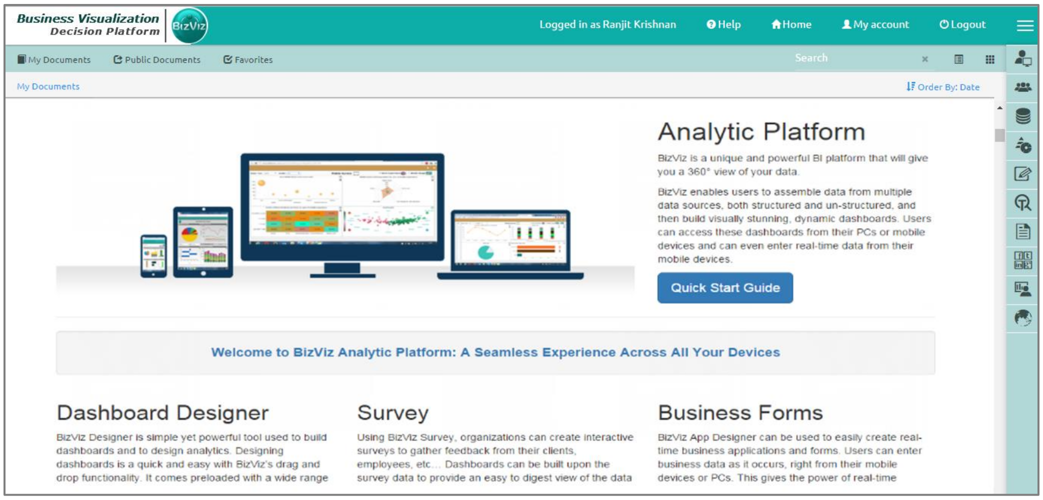
4.1. Accessing the BizViz Platform

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

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



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



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

- **Public Documents**

- The Public Document folder is available to all users.
- Users can view documents shared by others.

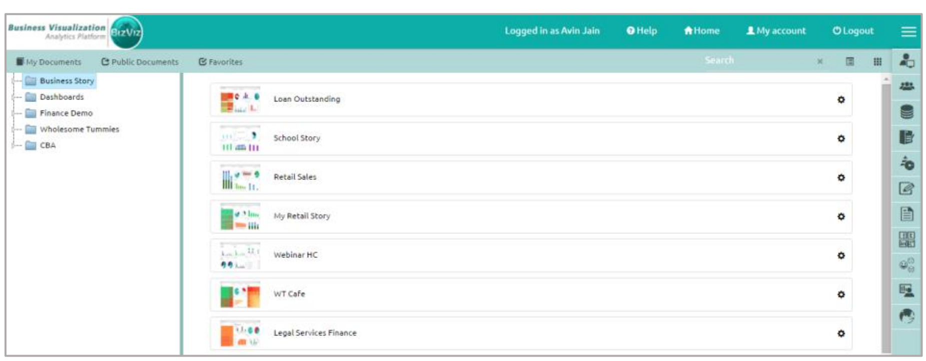
- **Favorites**
  - The documents marked as favorite by a user are saved under '**Favorites**'.
  - Generally, the documents in frequent use by the users are a part of Favorites.
  - Users can remove a document from '**Favorites**' (if desired).

4.2.3. Displaying and Ordering Documents

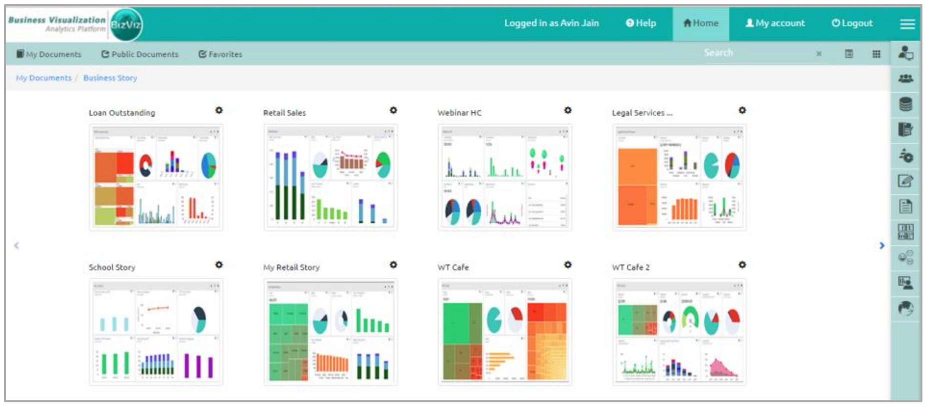
The following features are provided to arrange and display various platform documents:

- **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.

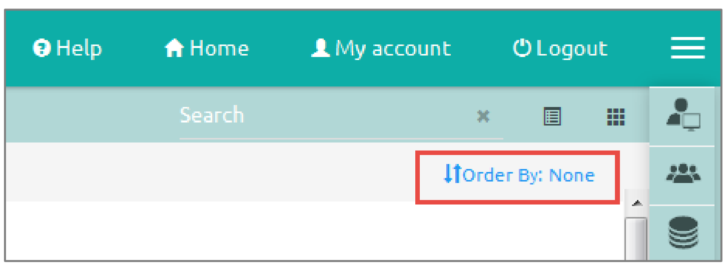


- **Grid Panel:** Click ‘**Grid**’ icon to display all the documents in a grid view (the default view to display platform documents).



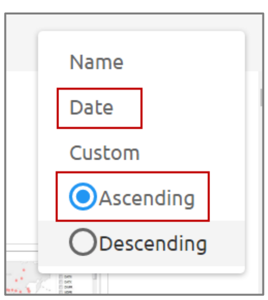
- **Document Ordering:** This feature allows users to sort documents in the portal home screen. There are three sort options: **Alphabetical/Name (Ascending and Descending), Date (Ascending and Descending), and Custom**.

i) Click ‘**Order By**’.

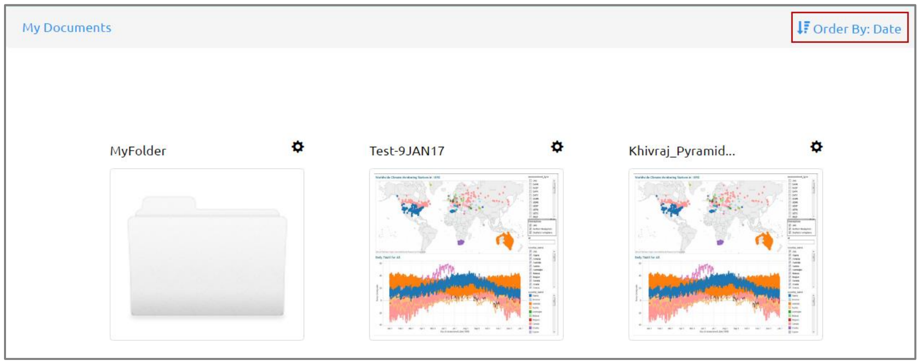


ii) A context menu opens.

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



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.

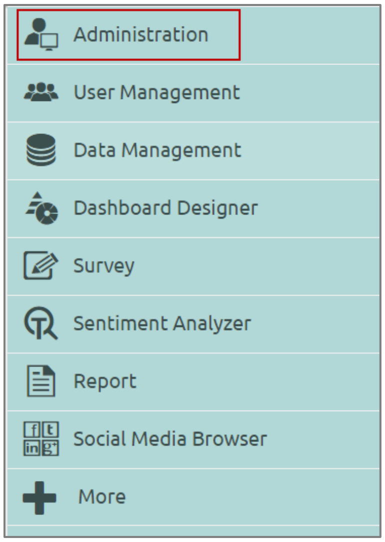
5.1. Accessing the Administration Plug-In

i) Navigate to the Platform home page.

ii) Click '**Menu**' button.

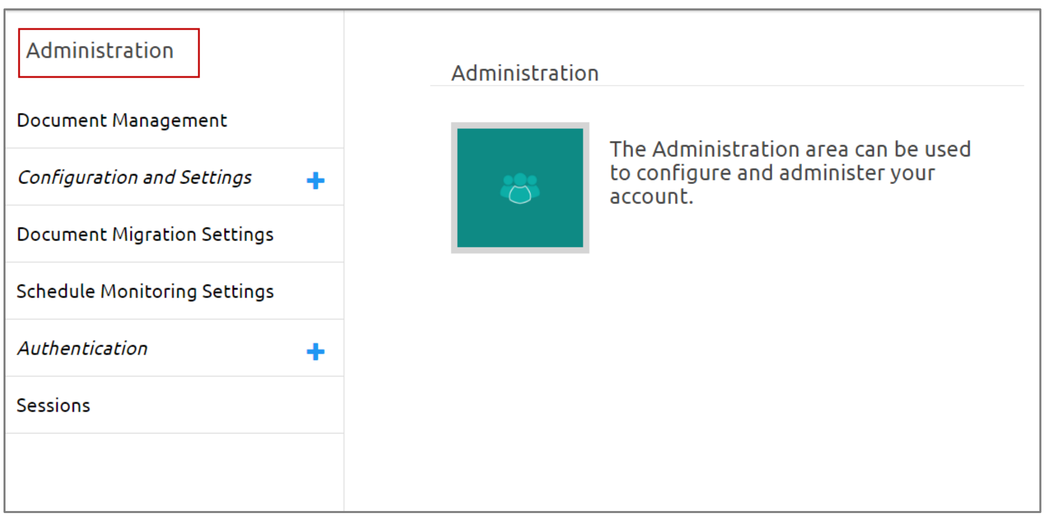
iii) A list containing all the plugins will be displayed.

iv) Select '**Administration**' plugin from the list.

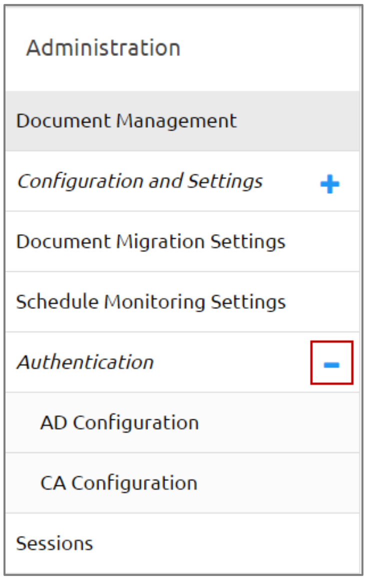


v) Users will be redirected to a new page containing a list of the administration options.

vi) The administration options that contain more than one sub-categories are listed with the '**Expand**' + sign.



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



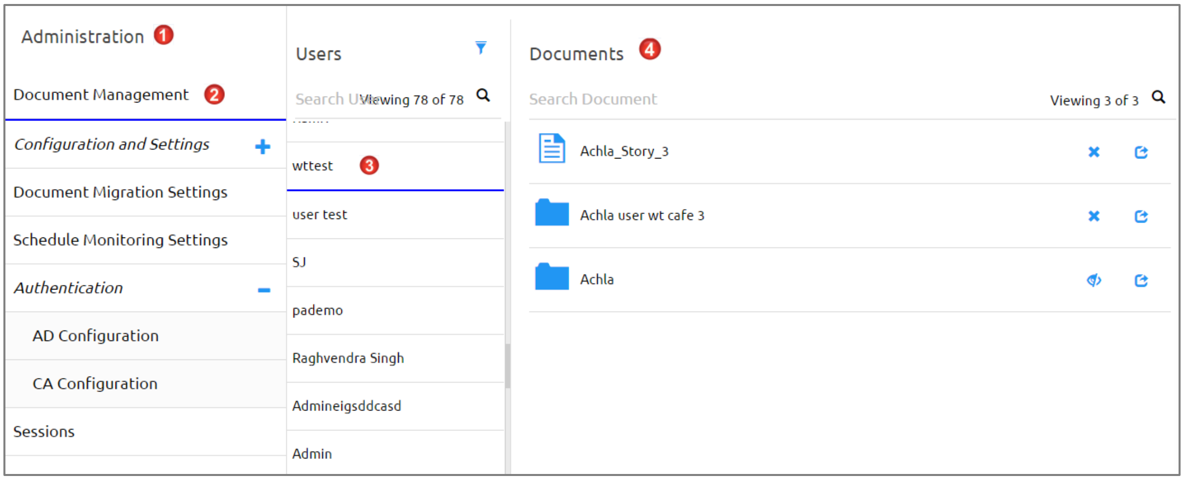
5.2. Administration Options

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.



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
	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.

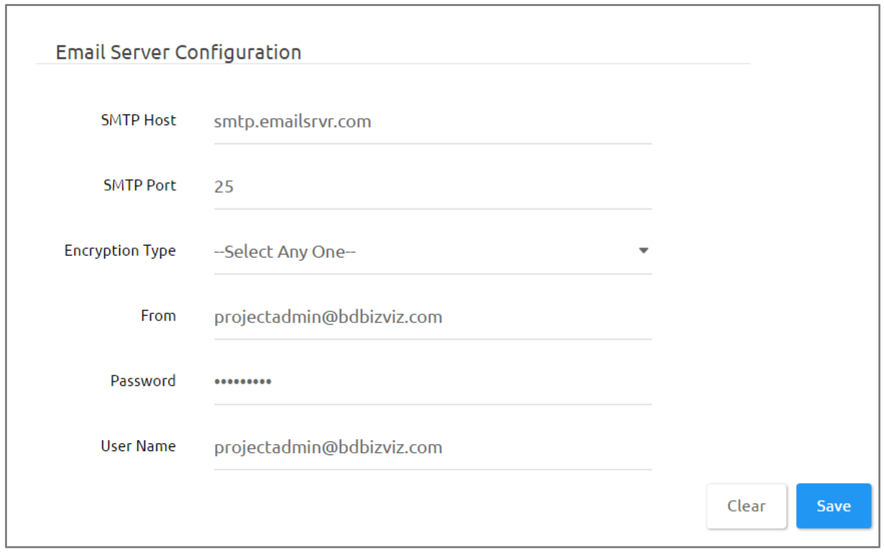
5.2.2.1. Email Settings

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
   - **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.



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.

Note:

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

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

5.2.2.3. Audit Trail Settings

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

This section contains two options:

- **General Settings**

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

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

  b. Select '**On**' or '**Off**' option by using the ON/Off button.

  c. Click '**Save**'.

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

- **DB Configuration Settings**

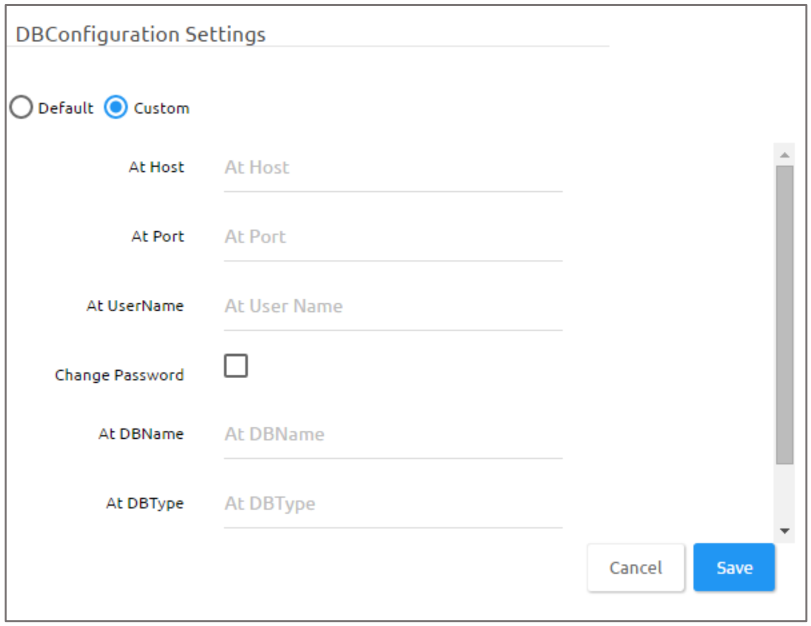
  This section is provided to configure Database/ BizViz Repo Database settings.

  There are 2 ways to configure data base settings:

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

     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**'.



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

Note: Click **'Cancel'** to undo the audit trail settings**.**

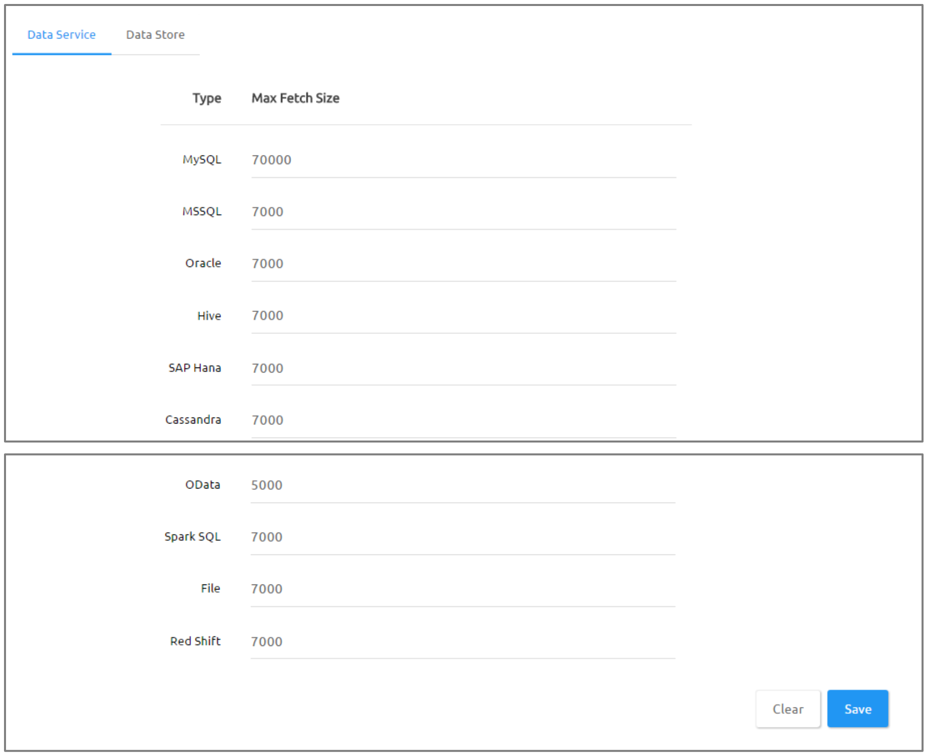
5.2.2.4. Data Management Configuration

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**'.



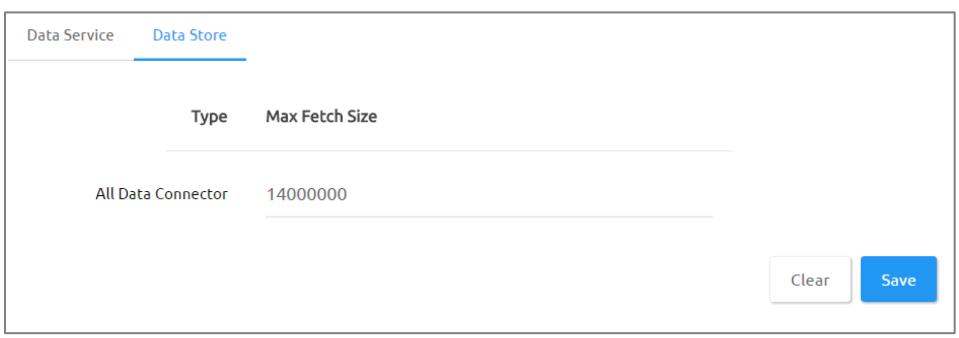
- **Data Store**

  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.

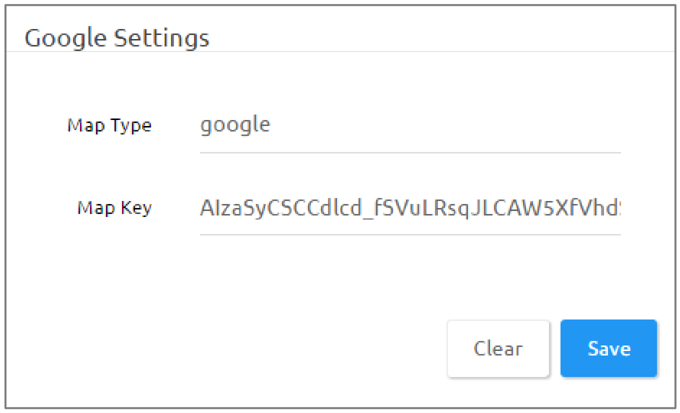
  c. Click '**Save**'.



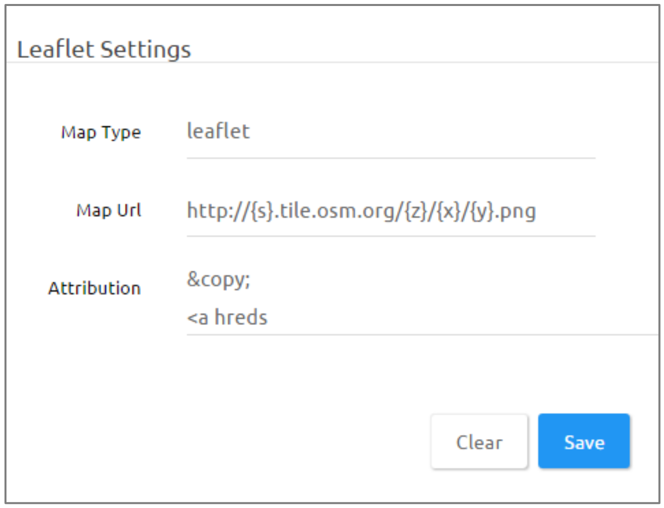
5.2.2.5. Geospatial Settings

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**’.



- **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**’.



- **Uploading a Geo Shape File**

  a. Click '**Add**' + button provided next to the '**Geometry Type**'.

  b. '**Upload Geo Shape File**' fields will be displayed.

  c. Enter the following information:

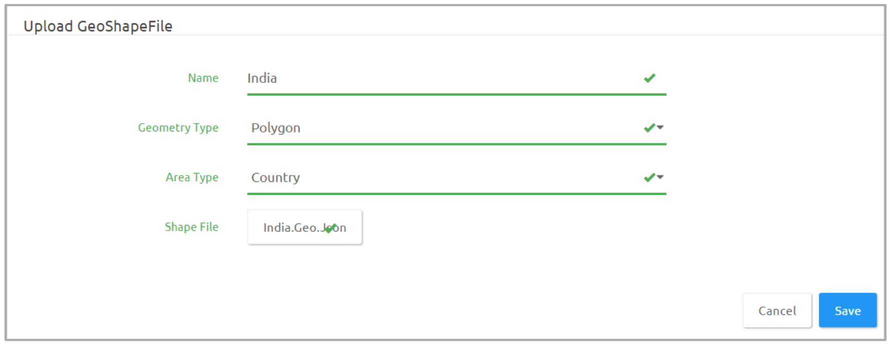
     i. **Name**: Title for the map

     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**'.

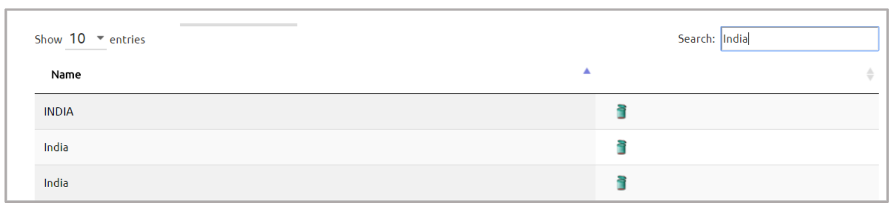


f. A message will pop-up to assure that the file has been uploaded.

- **Deleting a Geo Shape File**

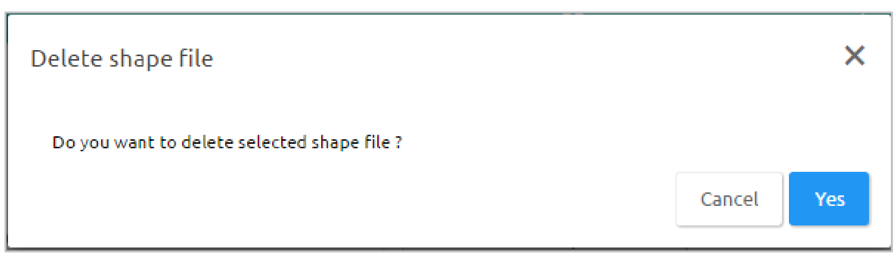
a. The uploaded Geo Shape file will be added into the list and displayed at the bottom of the window.

b. Click '**Delete**' provided next to a Geo Shape File.



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

d. Select '**Yes**'.

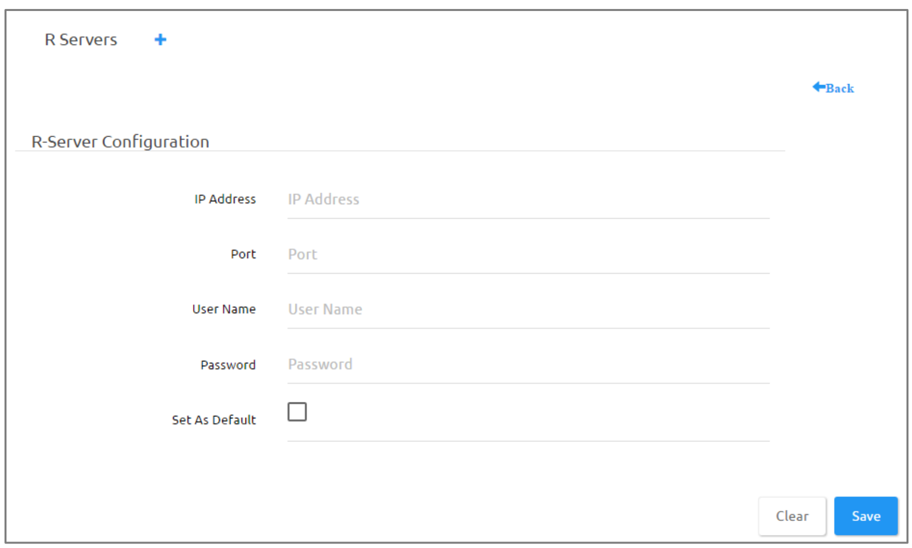


e. The selected file will be removed from the list.

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.

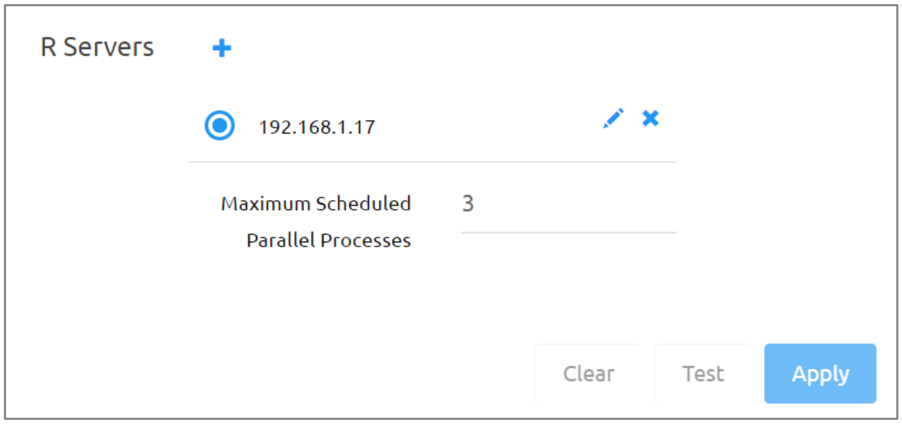
- **Steps to Create a New R-Server**
  a. Click ‘**Predictive Settings**’.
  b. Click ‘**Add**’ button + provided for R-Server Configuration.
  c. R-Server configuration fields will be displayed.
  d. Click ‘**Edit**’.
  e. Fill in the following information:
     i. IP Address: IP address of the R-server
     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**’.



  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.



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.

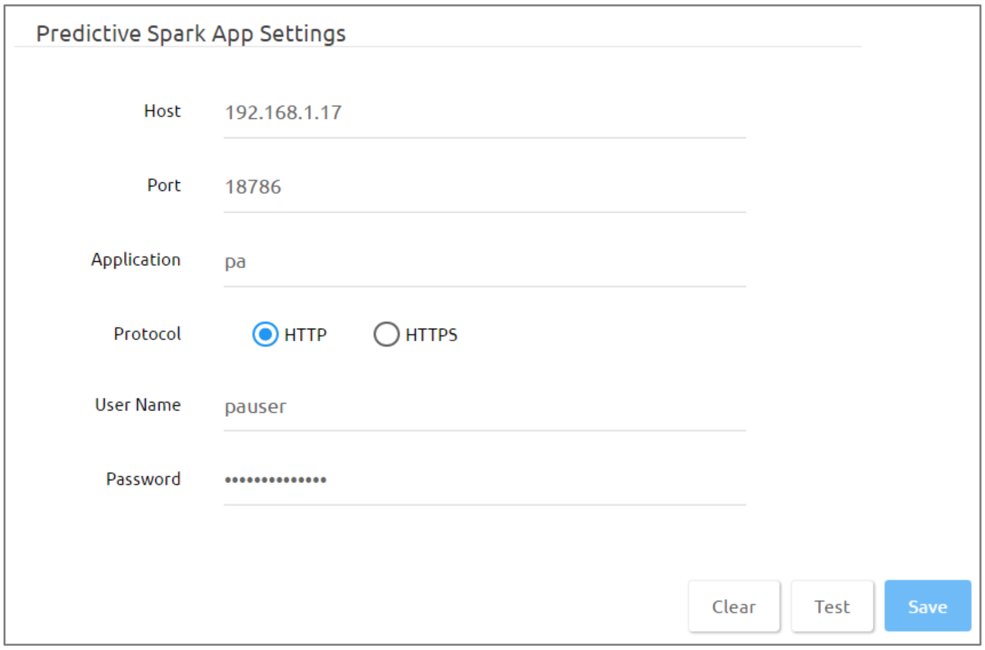
- **Predictive Spark App Settings**

  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**’.

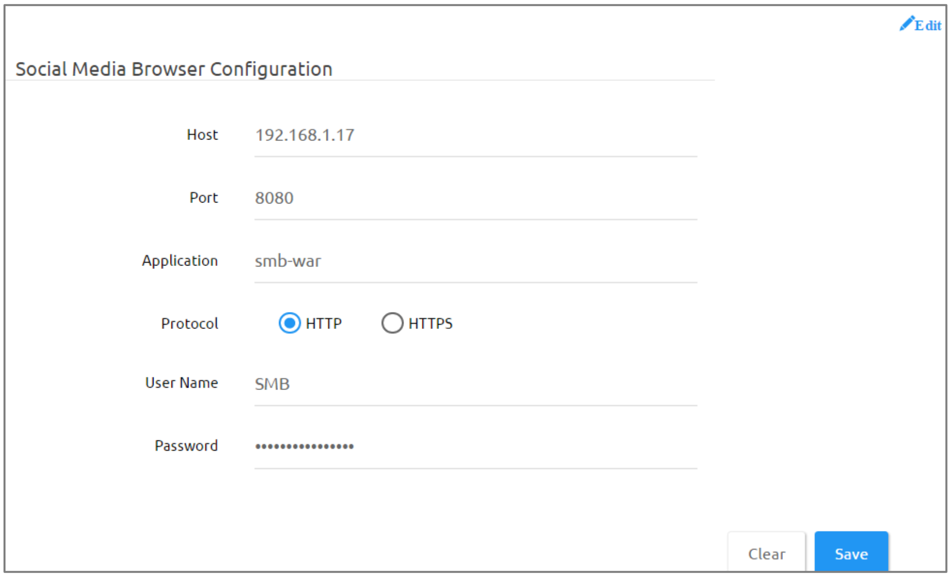


5.2.2.7. SMB Server Configuration

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.



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**’.

Note: Click ‘**Clear**’ to erase the entered information.

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:

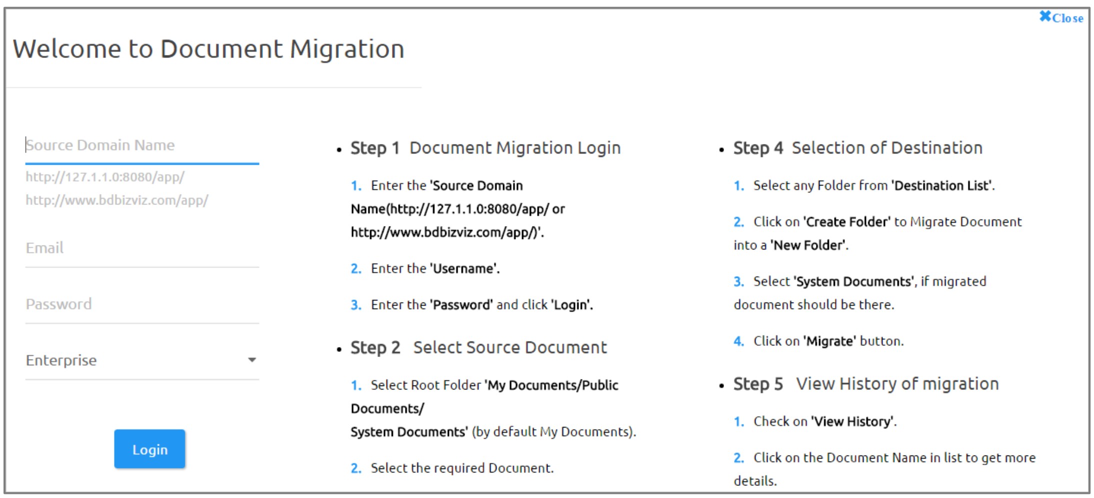
a. **Source Domain Name:** Enter address of the destination server

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

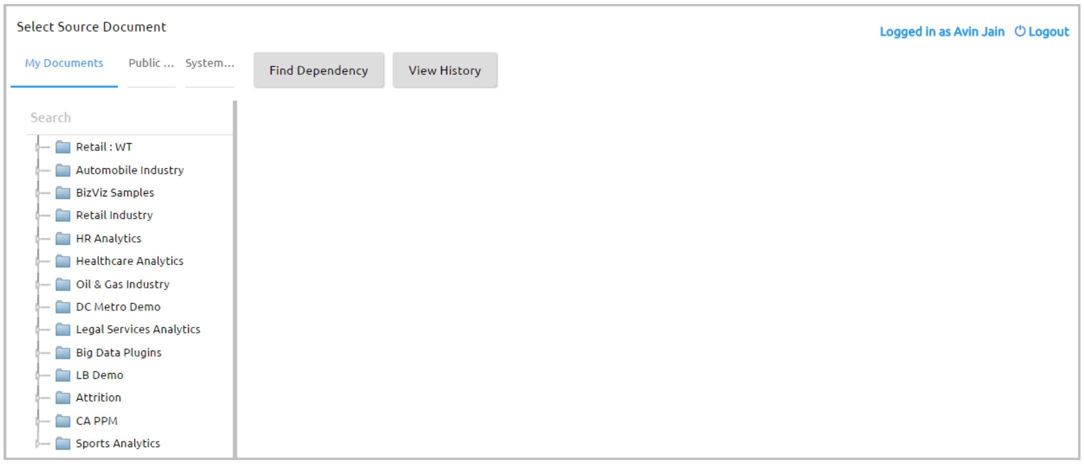
iii) Click '**Login**'.



2. Select Source Document

i) Clicking on '**Login**' will display the below given page.

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



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

3. Steps to Migrate a Document

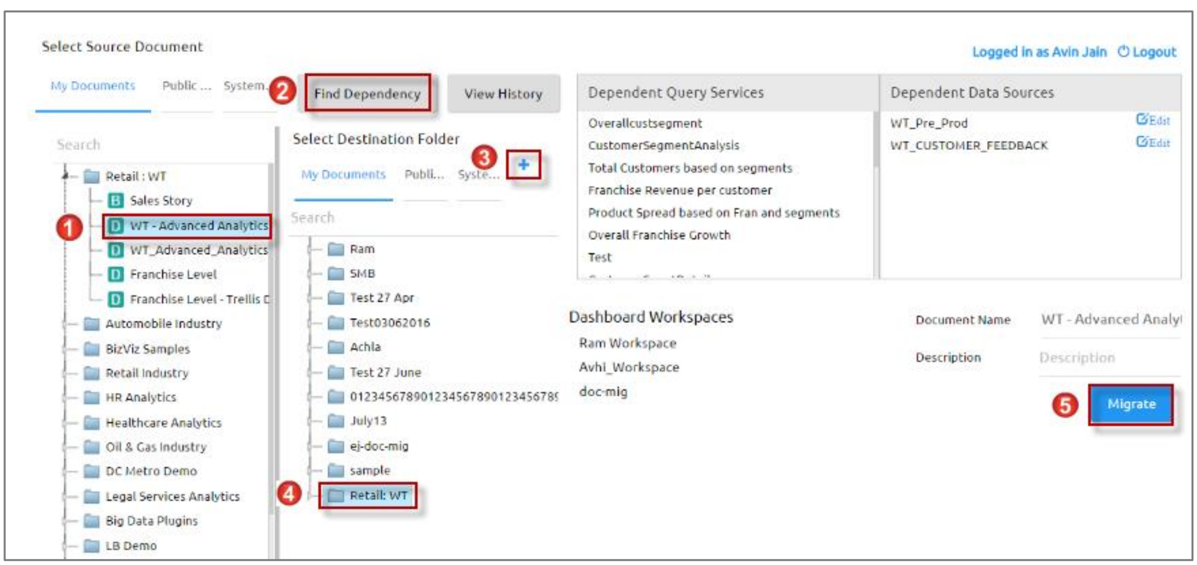
i) Select a file from the list of source document (as shown below).

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.

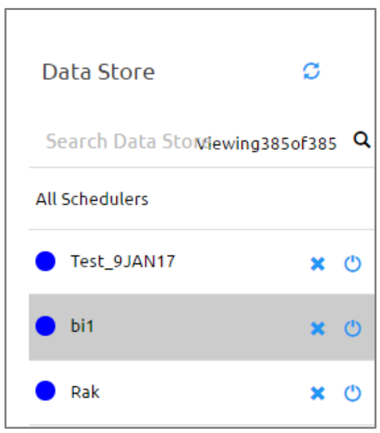


4. **View Migration History**
   i) Click **'View History'.**
   ii) A list of migrated documents will be displayed.
   iii) Select a document from the list.
   iv) Click on the document for more details.

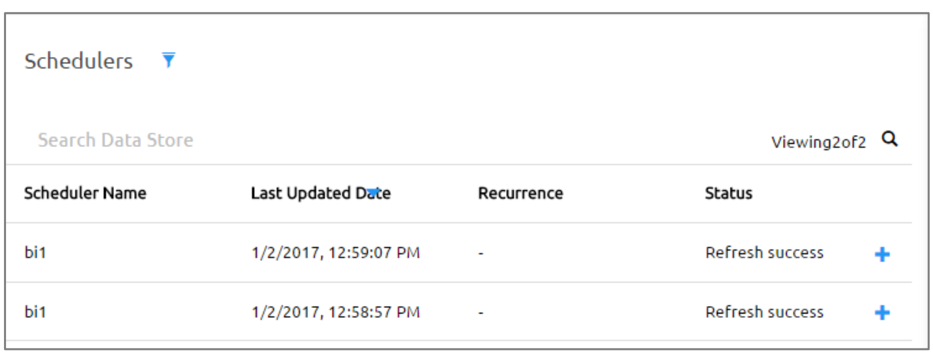
5.2.4. Schedule Monitoring Settings

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.



Note:

a. Click the ‘**Start/Stop**’ button to start the scheduler.

b. Use ‘**Filter**’ button to display filtered details for the scheduler.

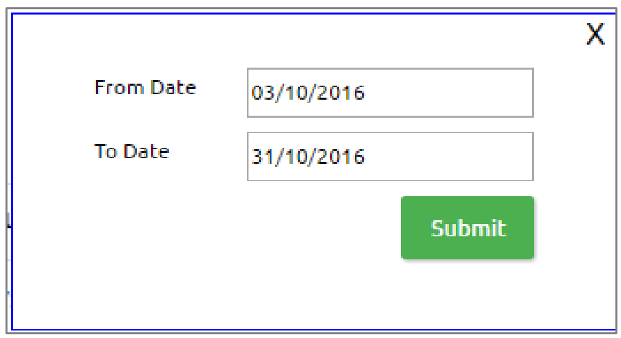
   i) Click ‘**Filter**’ button.

   ii) A pop-up window will appear.

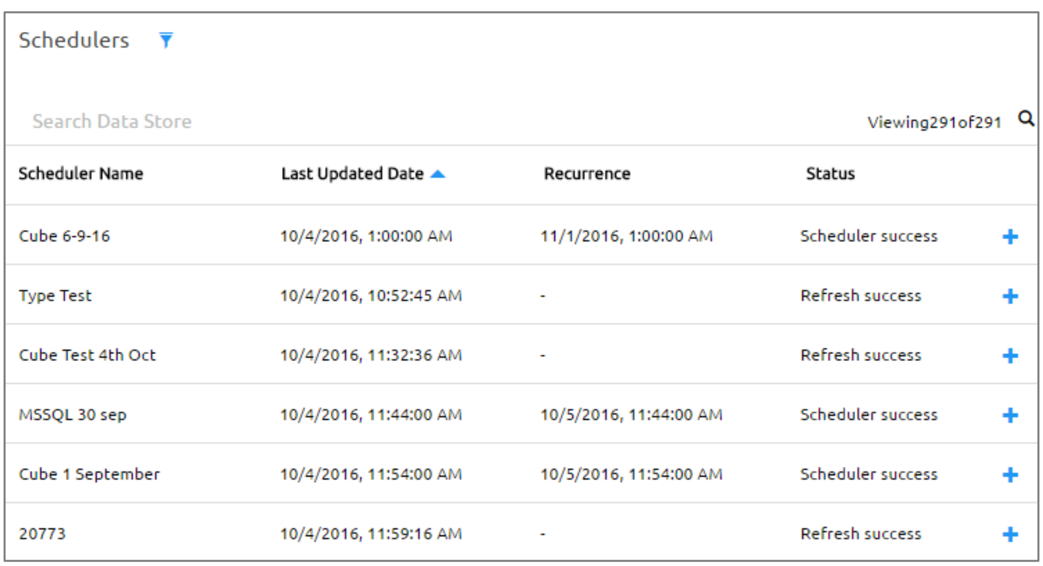
   iii) Fill the required information:

      1. From Date
      2. To Date

   iv) Click ‘**Submit**’.



   v) The filtered data will be displayed.



Schedulers

Search Data Store — Viewing291of291

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.

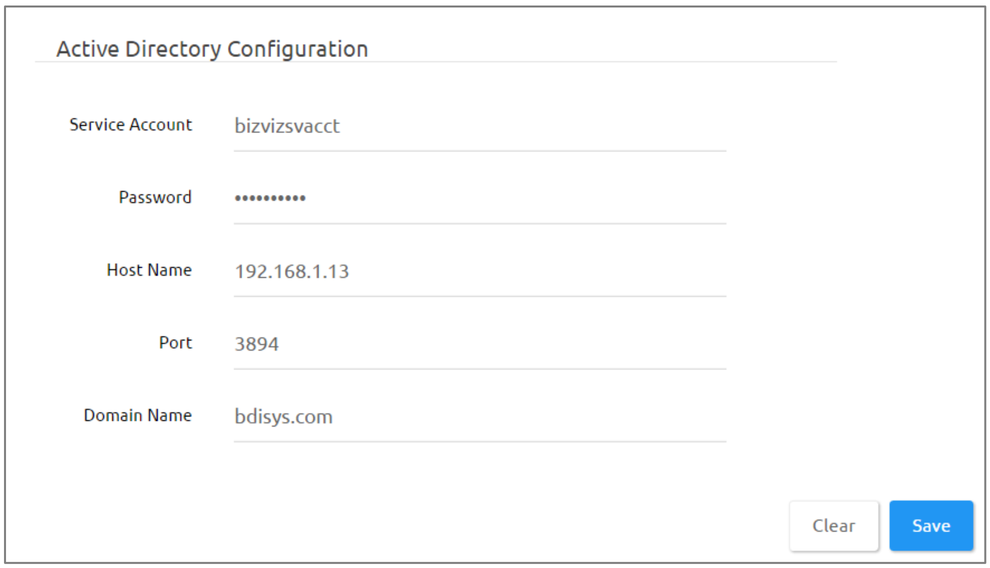
5.2.5.1. Active Directory Configuration

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

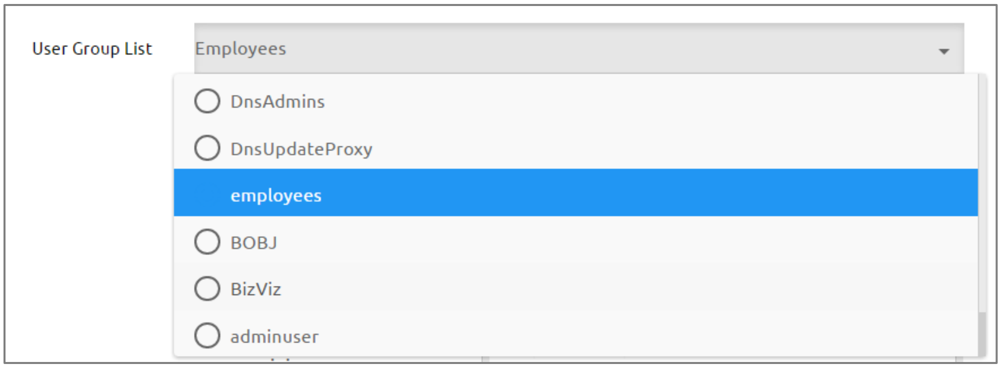


d. Click the ‘**Synchronize**’ 

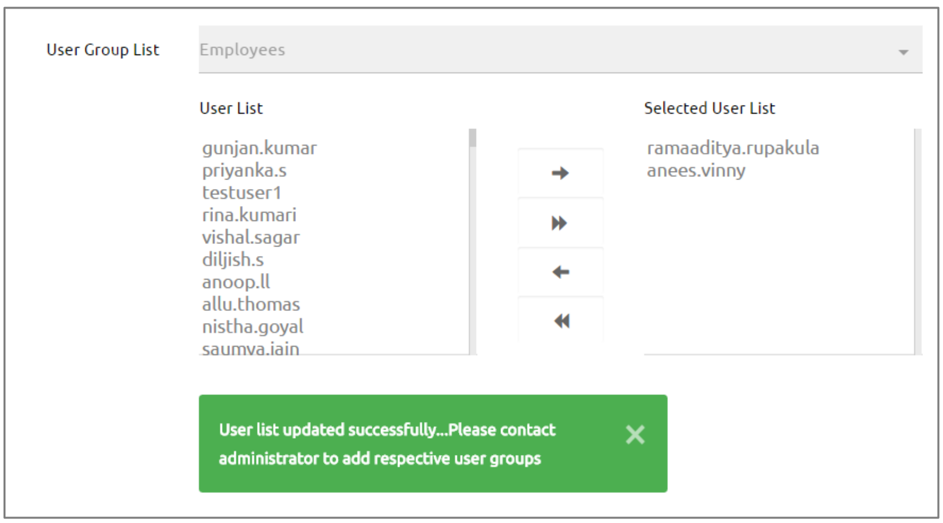
option.

e. A new window will open.

f. Select a user group using the ‘**User Group List**’ drop-down menu.



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.



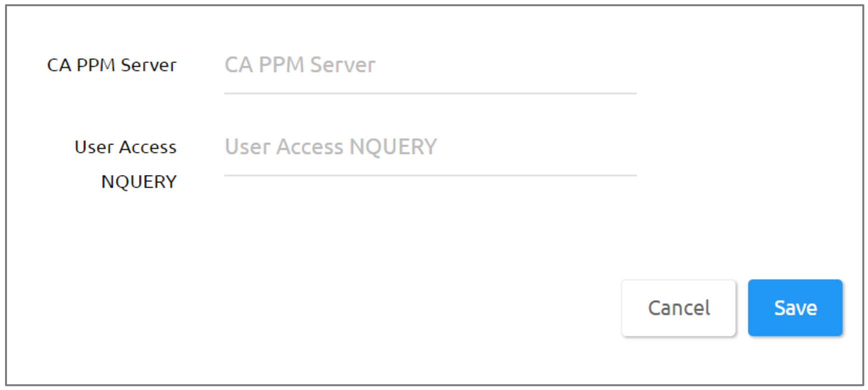
5.2.5.2. CA PPM Configuration

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**’.

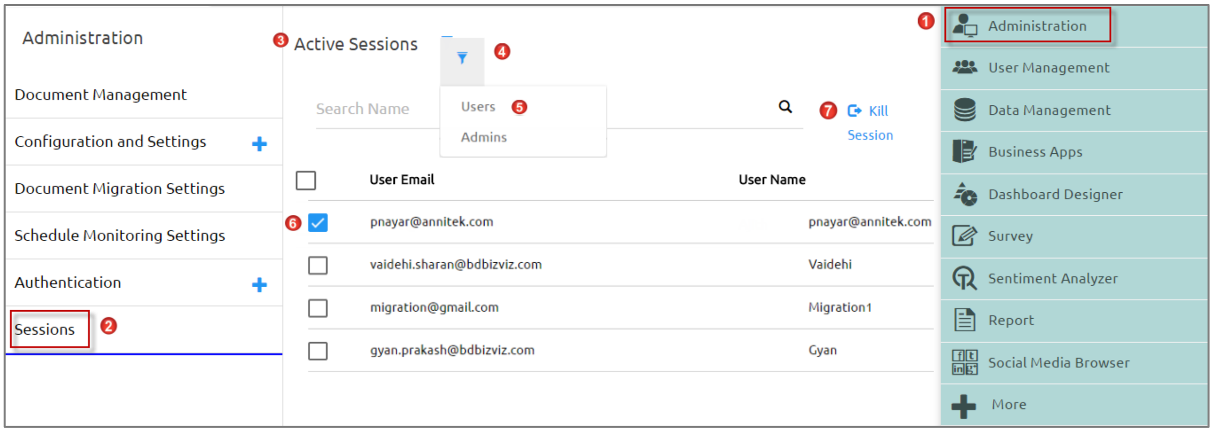


Note: Click ‘**Edit**’ to modify/ change the configuration fields.

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.



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.

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.

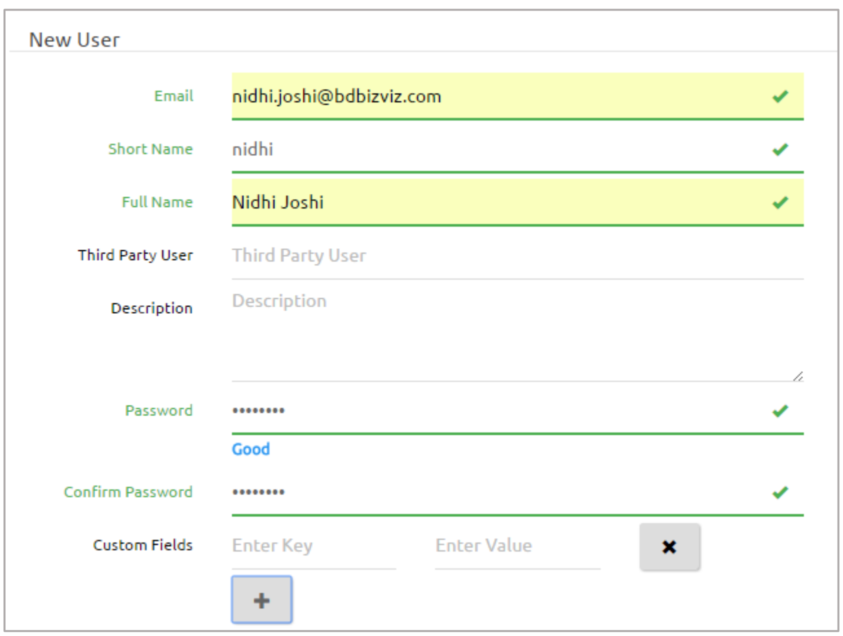
ii) '**New User**' window will be displayed.

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.

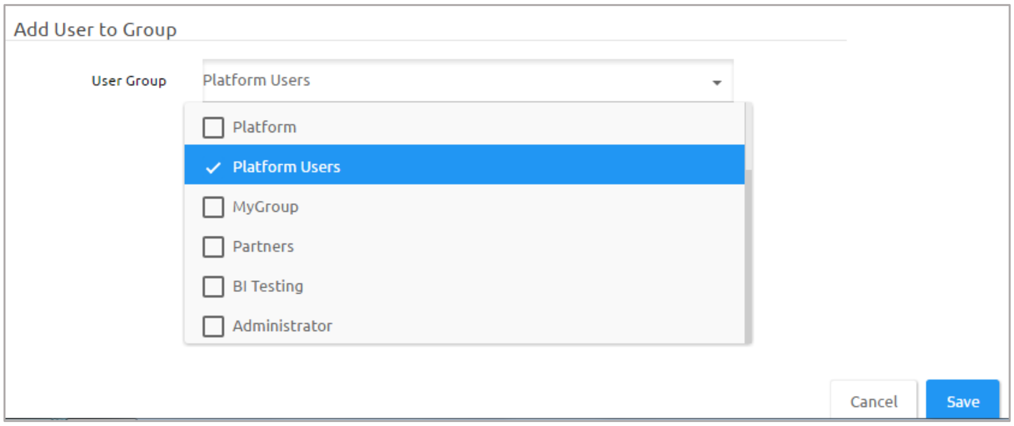
a. Enter Key – Enter a parameter category.
b. Enter Value – Enter a parameter property.



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**'.

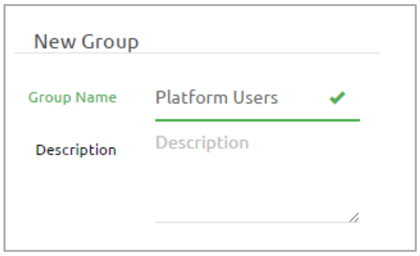


vii) A pop-up message will appear to assure that a new user has been created.
viii) A list containing the newly added user will be displayed (as shown below):

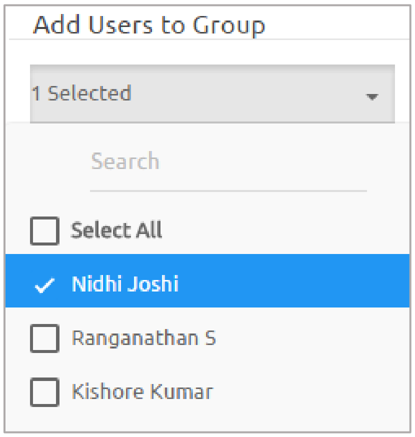
Options	Name	Description
	Edit	Edit the user details for a selected user
	Block	Block the selected user
	Remove	Remove the selected user from the user list
	Reset Password	Reset password for the selected user

6.3. Creating a New User Group

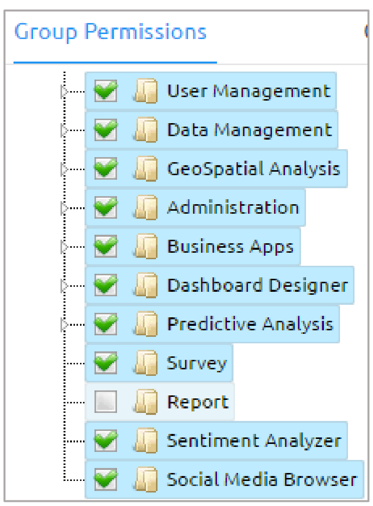
i) Click the '**Add**' button provided for creating a new User Group.
ii) '**New Group**' window will be displayed.
iii) Fill in the following information for a new User Group:
   a. **Group Name:** Enter a name for the user group
   b. **Description:** Describe the user group (optional)



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

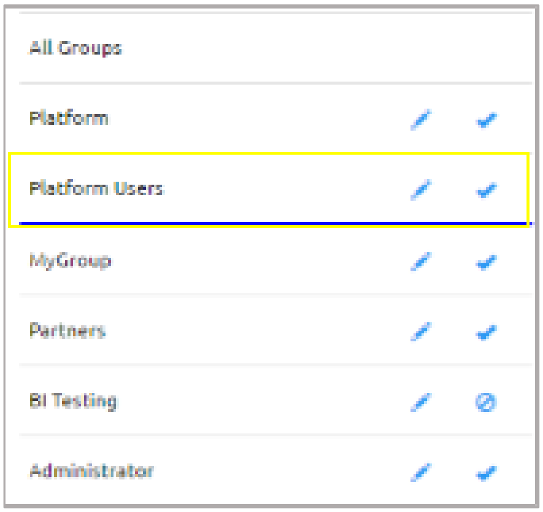


v) Assign various plugin rights to the User Group via the ‘**Group Permissions**’ tree structure menu.



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

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):

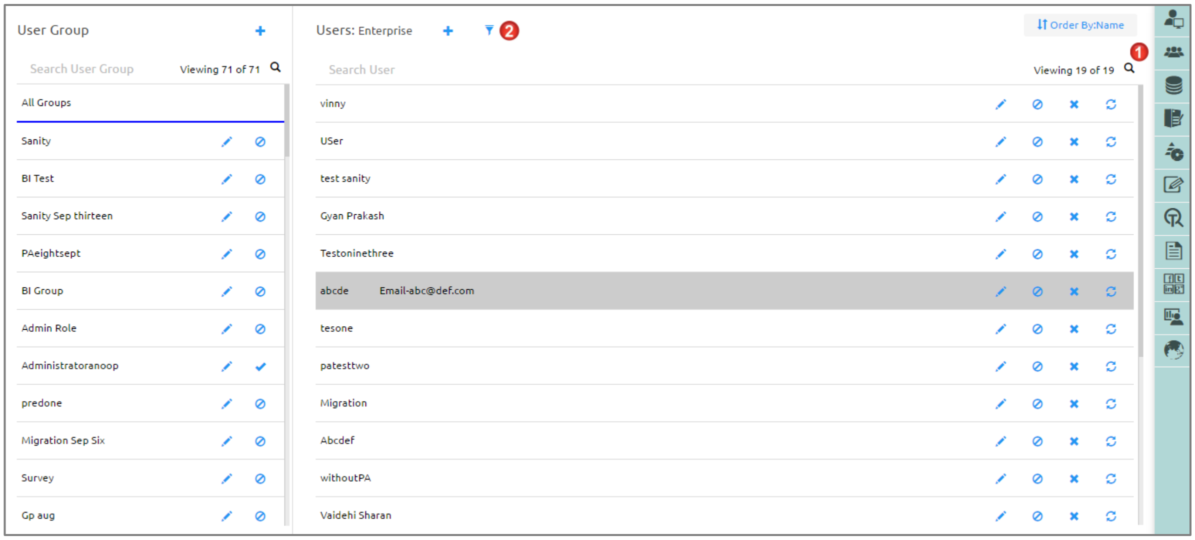


Option	Name	Description
	Edit	To edit details for the selected user group
	Activate Group	To activate the selected user group
	Block Group	To block the selected user group

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**'  button.



iii) A new window will appear with the following options:

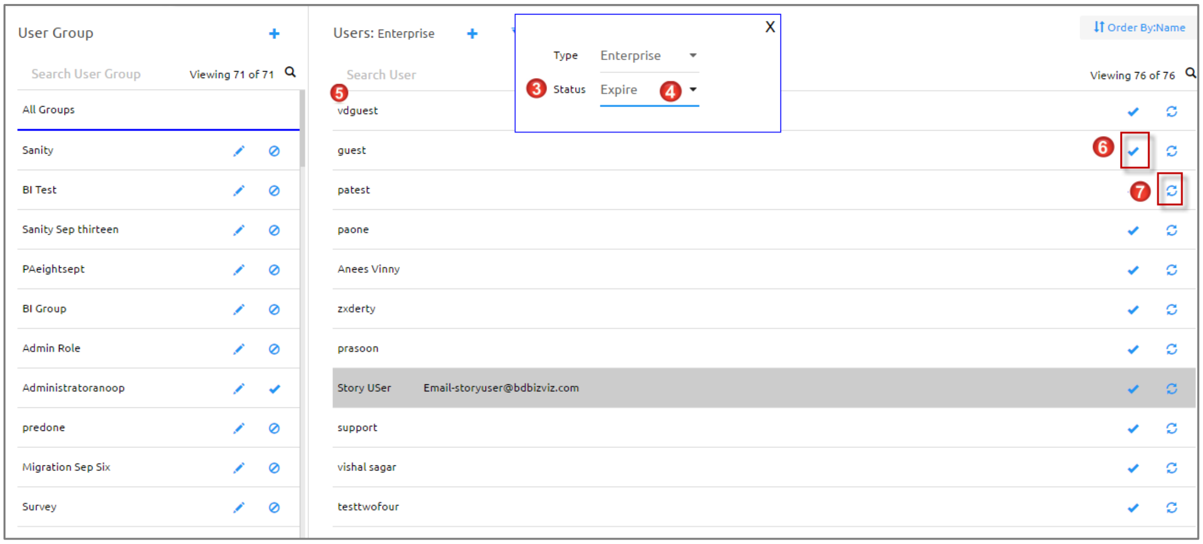
a. Type: Contains the following authentication types as drop-down options
   i. Enterprise
   ii. Windows AD
   iii. CA PPM

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 to set a new password for an activated user.



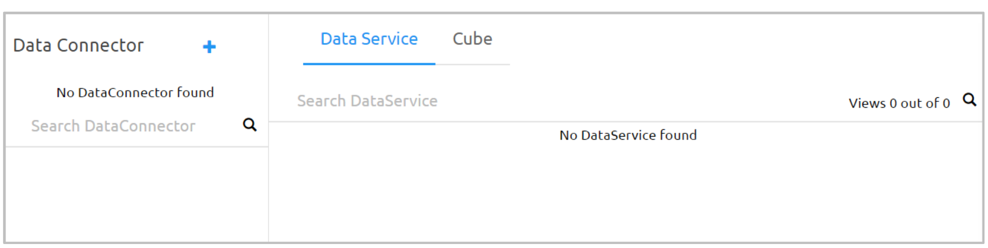
Note: By clicking '**Activate**', an expired user account can be activated and can use the old password. However, when the '**Reset Password**' option has been used, the user will be activated with a new password.

7. Data Management

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

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

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



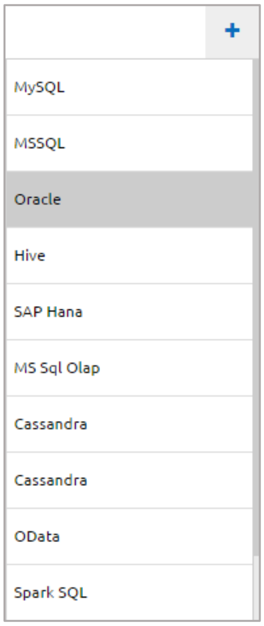
7.1. Creating a Data Connector

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.



v) Connector specific fields will be launched on the right pane of the screen.

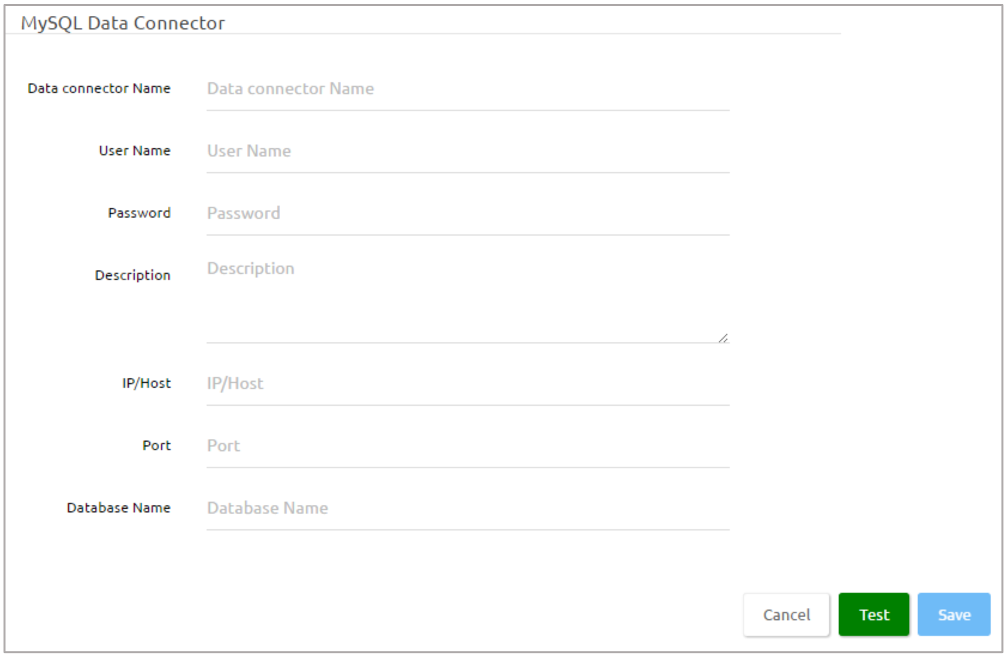
vi) *Fill the required information for a New Data Connector: Refer '**Required Fields for the Available Data Connectors**' segment for the details.

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:



***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)

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**

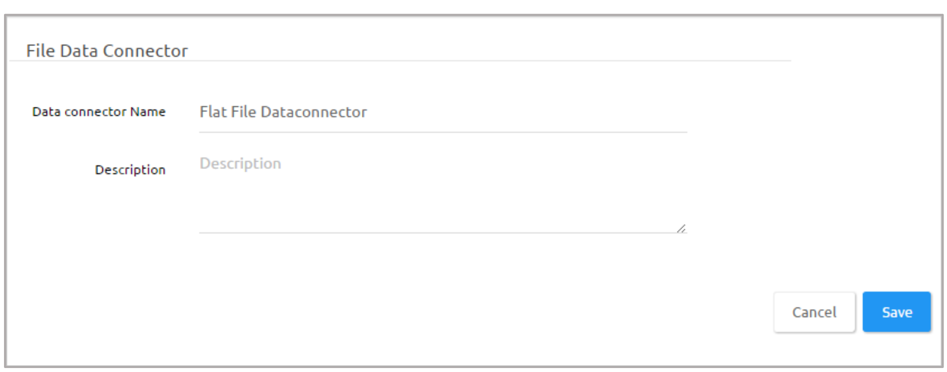
i) **Data Connector Name:** A user defined name to identify the data source
ii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
iii) **Password:** Enter the password (It should be the same as given in the connection server)
iv) **Description:** Connection Details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

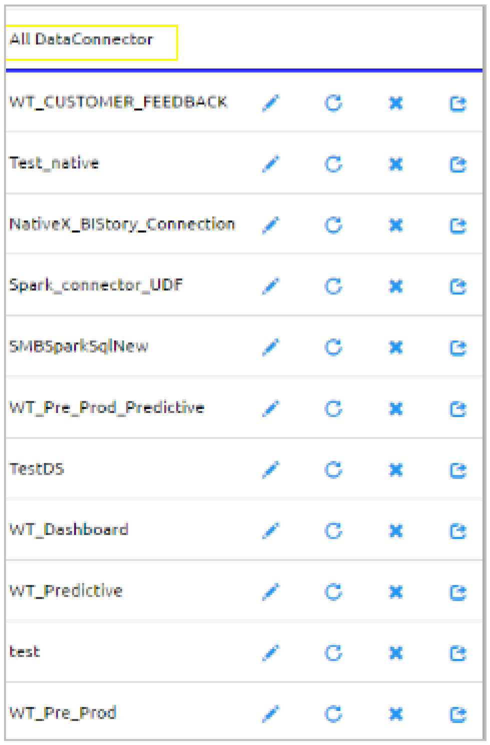


7.2. Data Connector List

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.



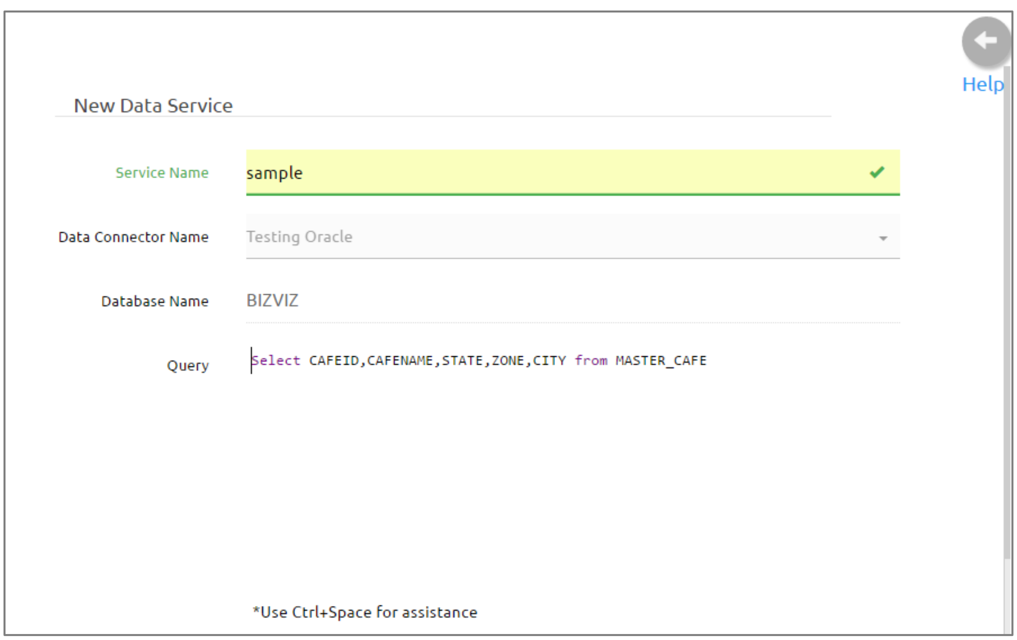
Option	Name	Task
	Edit	Edit the connector fields
	Reconnect	Reconnect with the server
	Remove	Remove a connector from the list
	Share connector	Share connector with the selected user(s) or group(s)

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**'.



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

Option	Name	Task
	Download	Download the data service
	Edit	Edit the data service fields
	Remove	Remove a data service from the list
	Share Data Service	Share/unable a query service to/for the selected user(s) or group(s)
	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:**

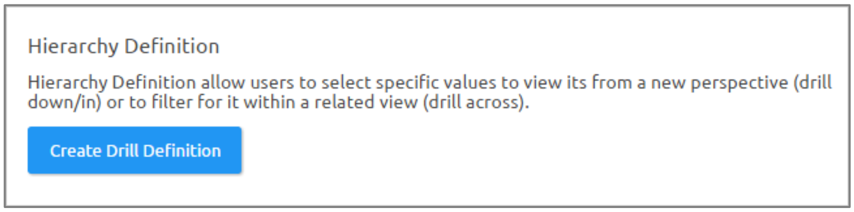
This section explains 5 step process to create a new data store.

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.

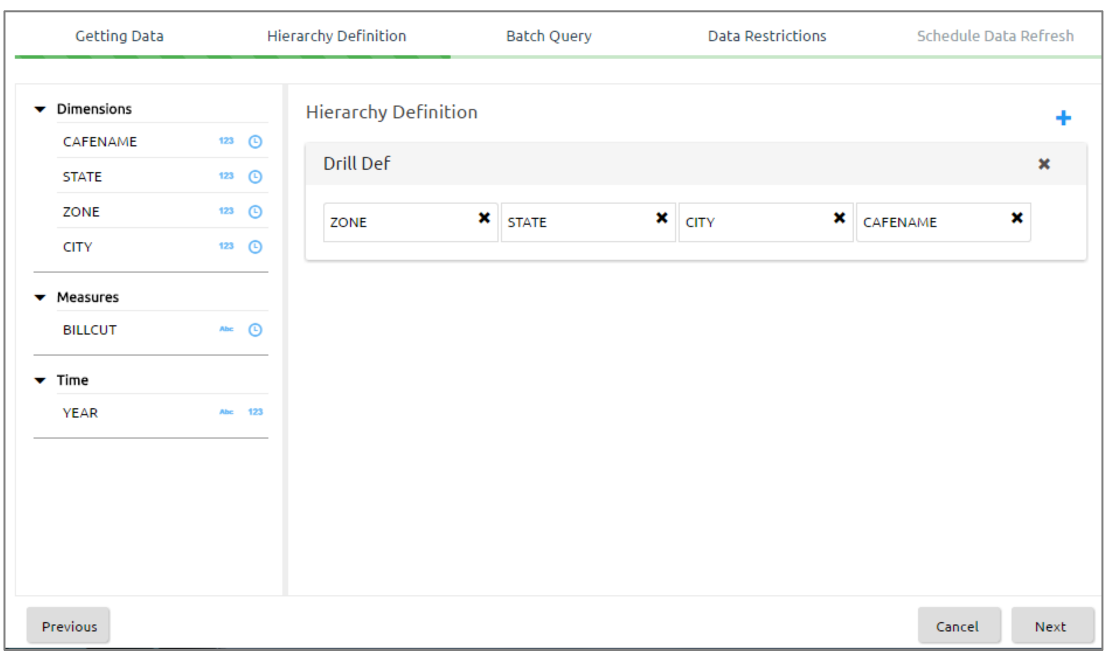
Step 2 - Hierarchy Definition: Define hierarchy for various dimension options

i) Click the '**Create Drill Definition**' button.



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

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



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

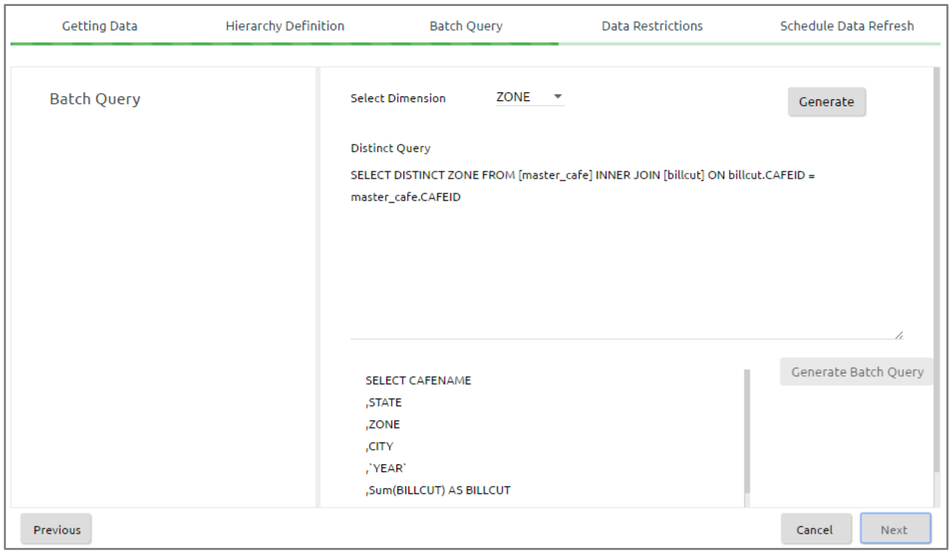
Note:

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
Abc	Move to Dimensions
123	Move to Measures
	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.



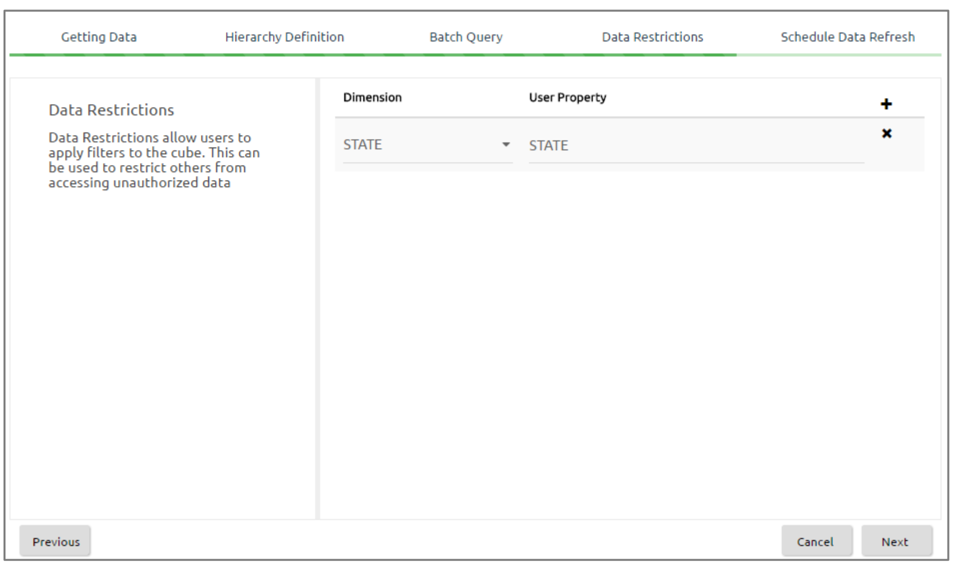
Step 4 - Data Restriction: Configure the settings to restrict a user level view

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)

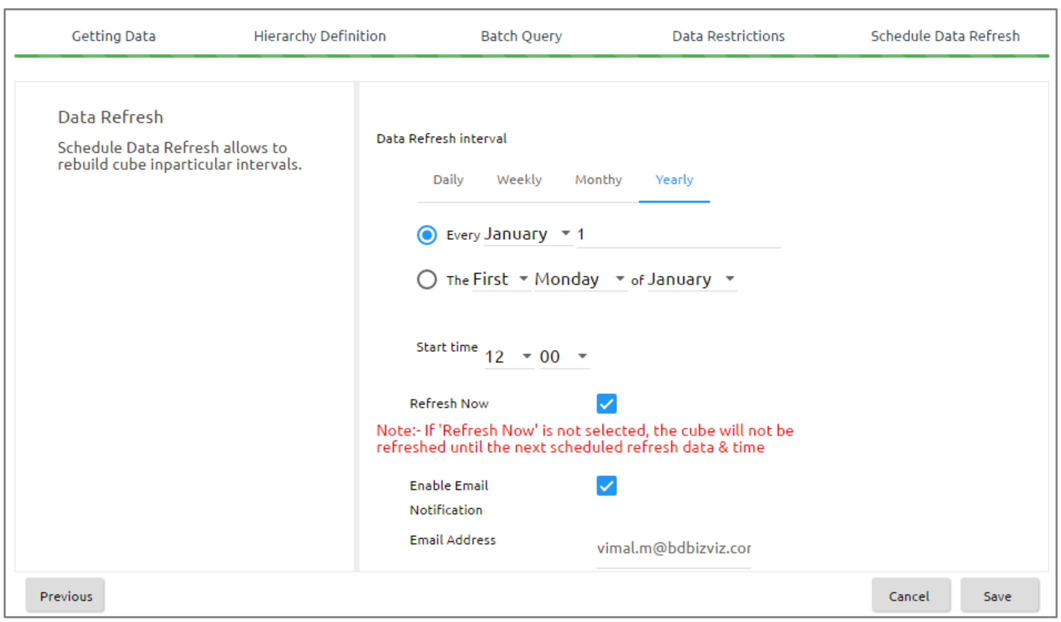


iii) Click ‘**Next**’ to proceed on the next tab.

Note: The Administrator can restrict data for a specific user via the User Management module or the Data Restriction tab when creating an 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. 'STATE' and 'State' are not exact matches).

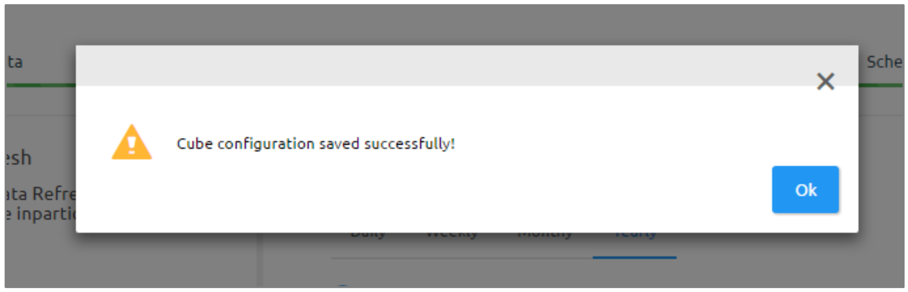
Step 5 - Schedule Data Refresh: Use this option to configure data refresh interval

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**'.



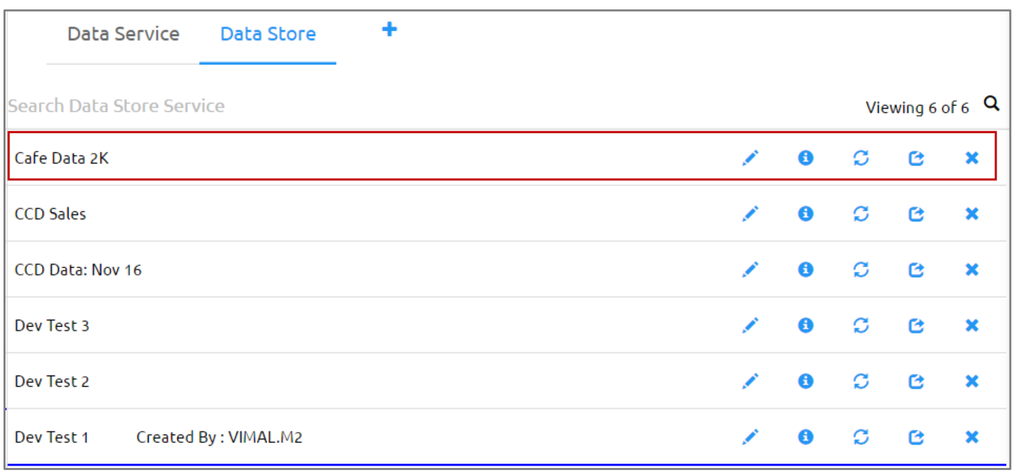
viii) A pop-up message will appear to confirm that the data store configuration has been saved.

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.



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

	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**’ 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

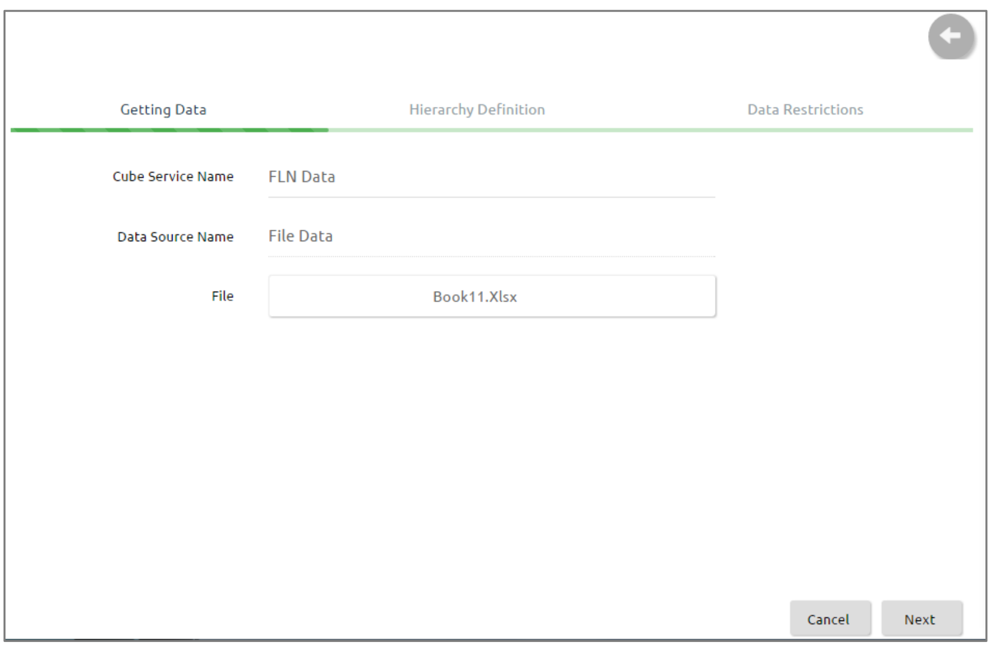
Step 1- Getting Data

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)

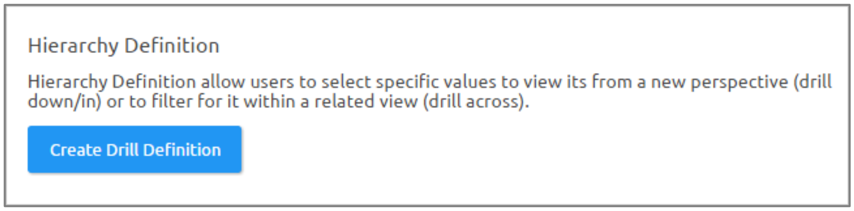
iii) **File:** Browse the required file using this option

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



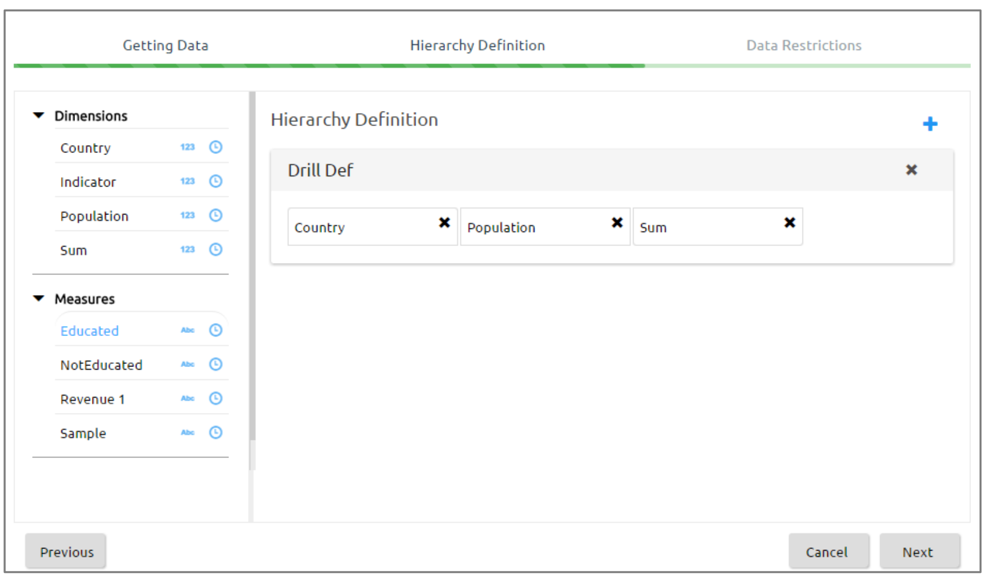
Step 2- Hierarchy Definition

i) Click the '**Create Drill Definition**' button.



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

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



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

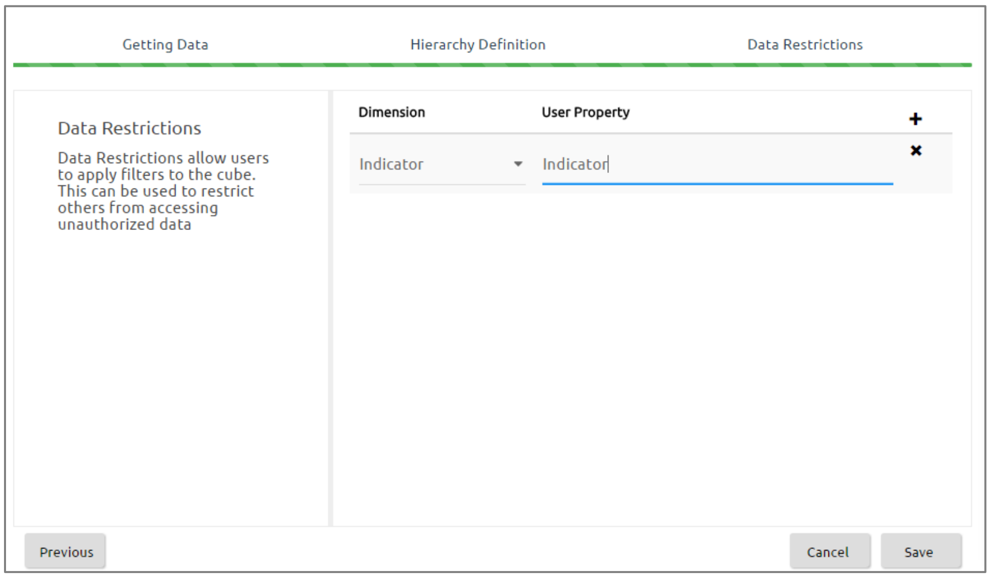
Step 3- Data Restriction

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).



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

Note:

d. '**Getting Data**' tab opens by default.

e. Click '**Back**' 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).

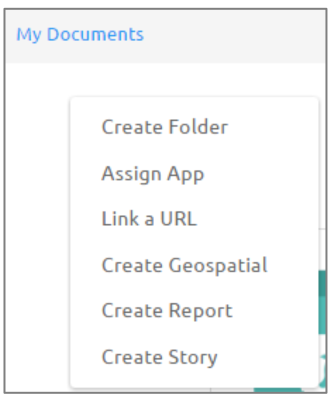
g. Click '**Previous**' to be redirected on the previous page.

8. Options

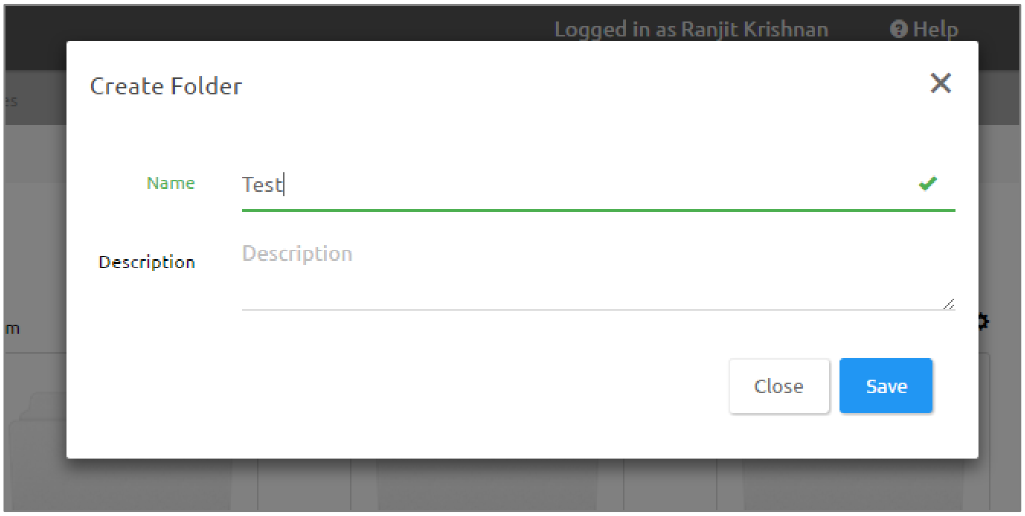
Users can access various options by using right click anywhere on the '**My Documents**' or '**Public Documents**'.

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**'.



ix) The folder will be created.

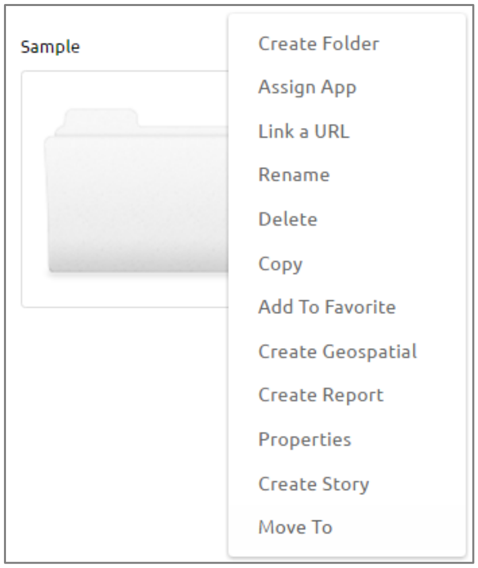
- **Options Assigned to a Folder**

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

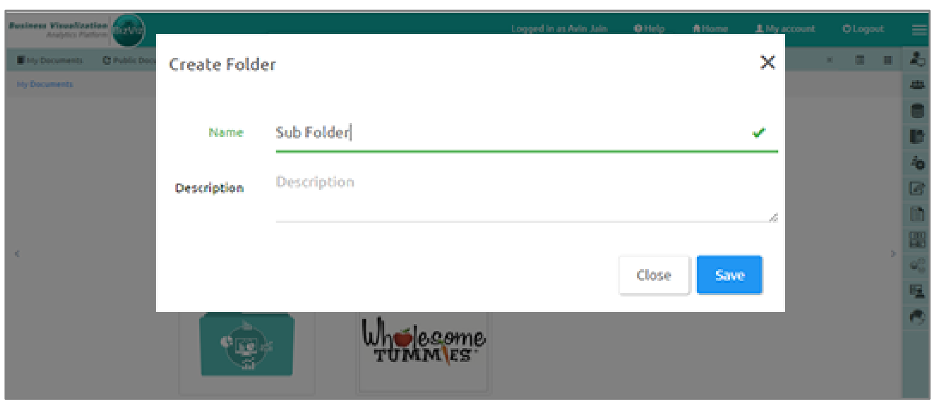
8.1.1. Creating a Folder (Sub-Folder)

i) Select a folder.

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



iii) Select '**Create Folder**'.
iv) A 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**'.



vii) The (sub) folder will be created.

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**' icon for options.

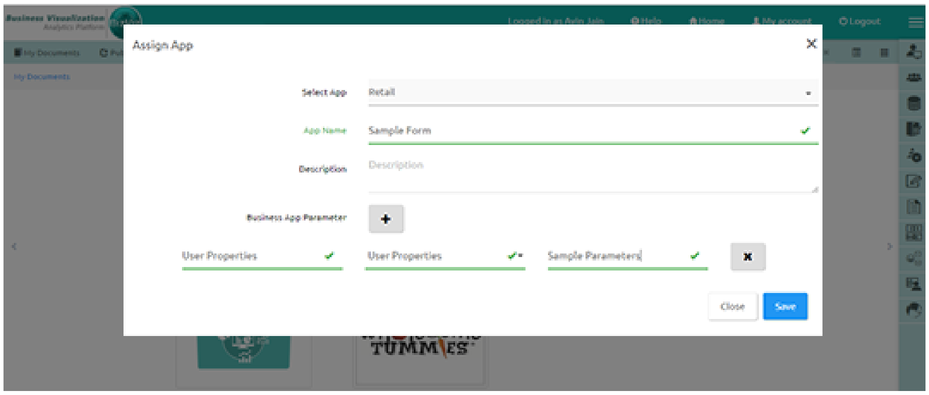
iii) Select '**Assign App**'.

iv) A pop-up window will appear.

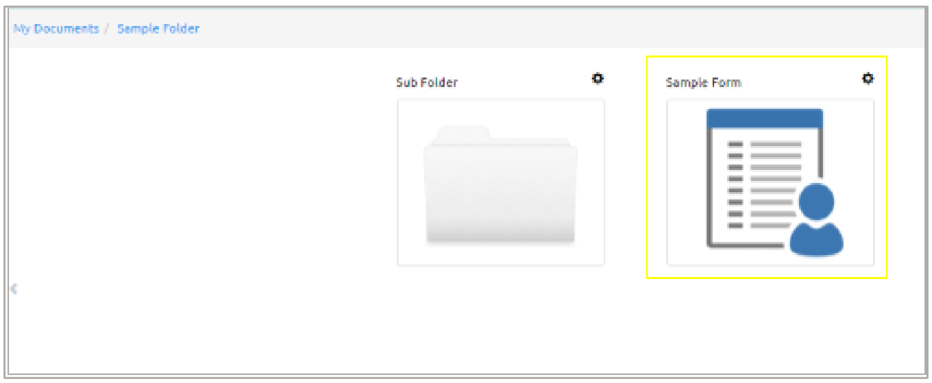
v) Fill in the following information:

   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**'.



vii) The app will be assigned to the folder.



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

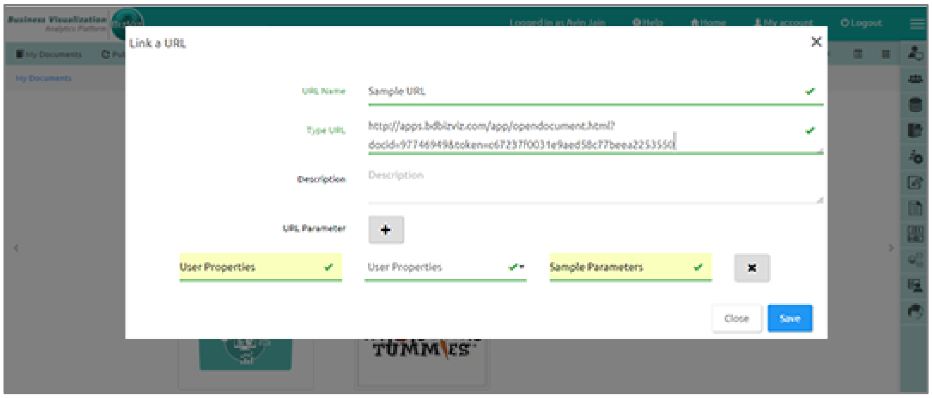
c. **Description**: Describe the URL (optional)

d. **URL Parameter**

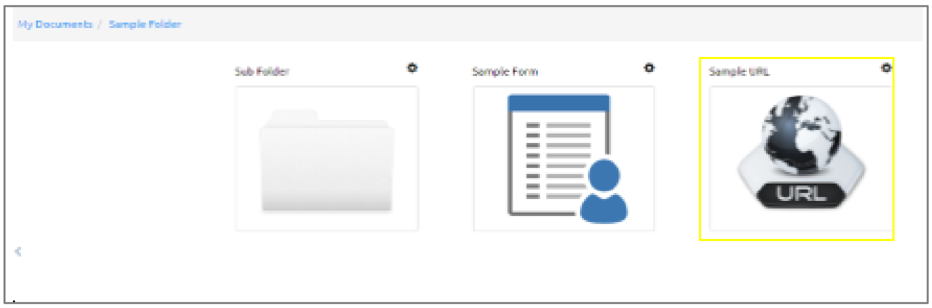
i. Click the ‘**Add**’ button to add a URL Parameter.

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

vi) Click ‘**Save**’.



vii) The URL will be linked to the folder.



8.1.4. Renaming a Folder

i) Select a folder.

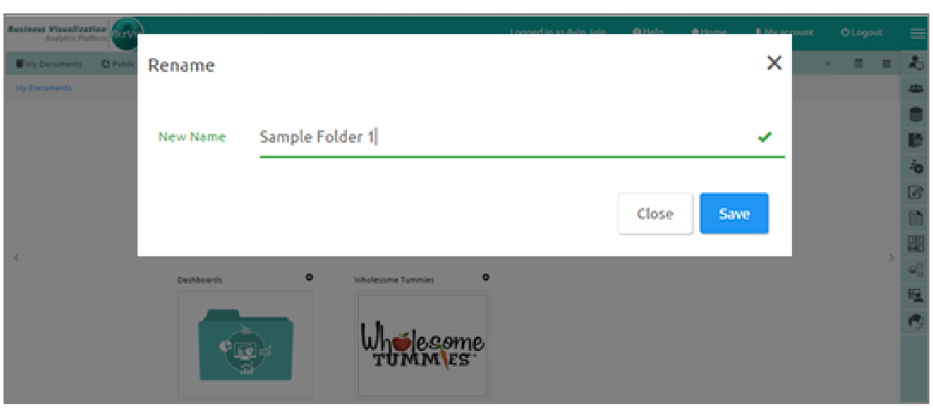
ii) Click the ‘**Settings**’ icon for options.

iii) Select ‘**Rename**’.

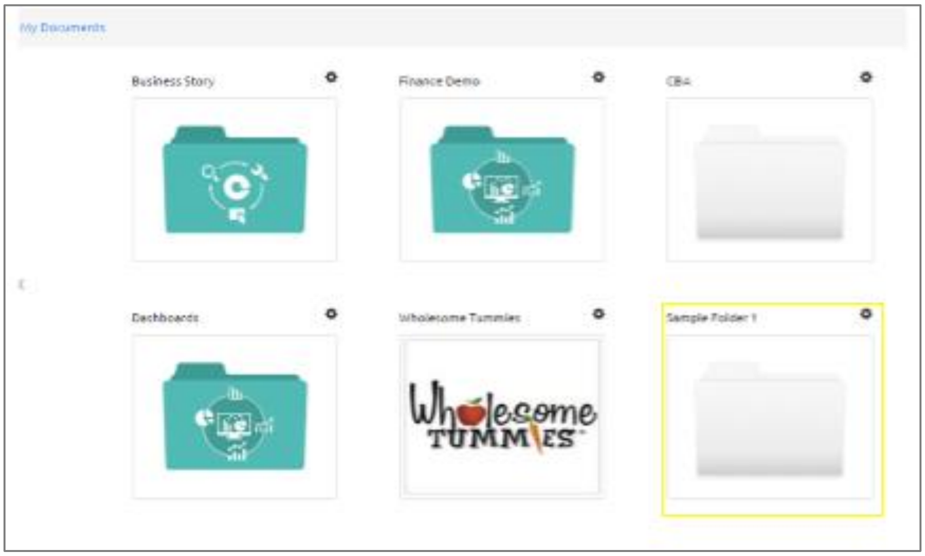
iv) A pop-up window will appear.

v) Enter ‘**New Name**’ for the folder.

vi) Click **‘Save**’.



vii) The folder will be renamed.



8.1.5. Deleting a Folder

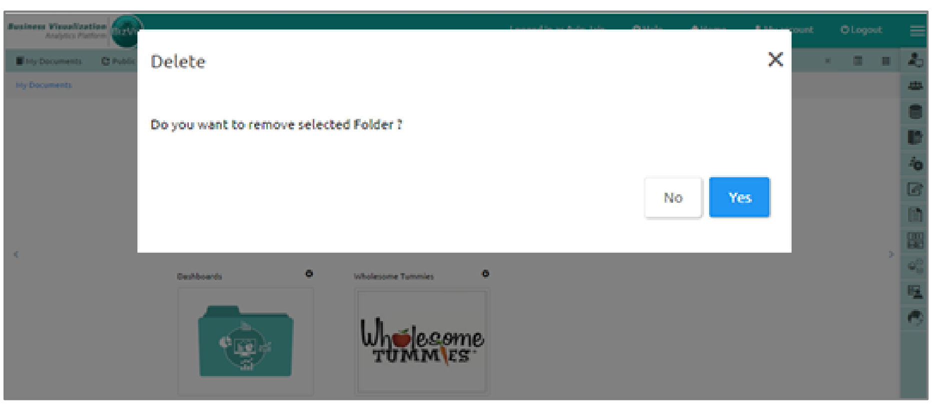
i) Select a folder.

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.

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

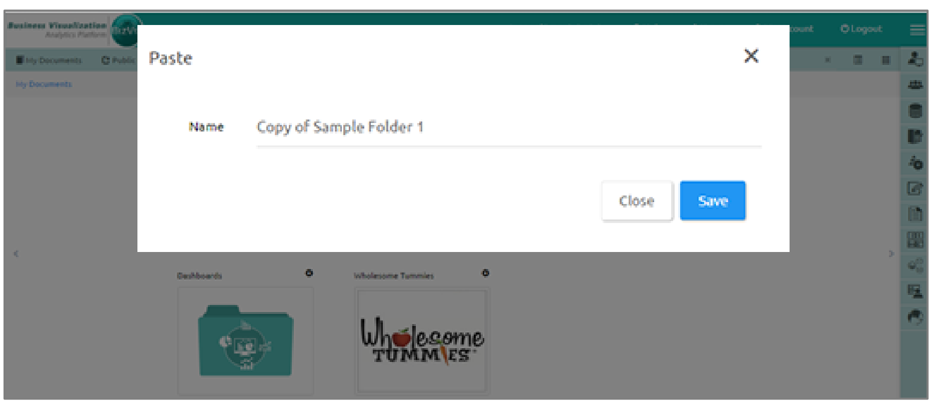
v) A context menu will appear with the '**Paste**' option.

vi) Select '**Paste**'.

vii) A pop-up window will appear.

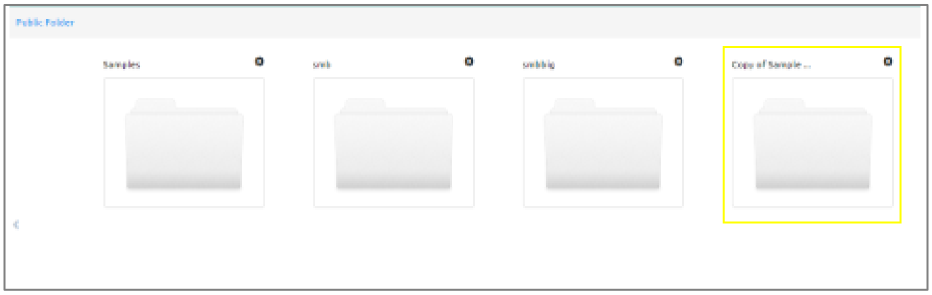
viii) The **Name** mentioned in the pop-up window shows prefix '**Copy of-**' before the original name of the folder (E.g. *Sample Folder 1* will have a new name *Copy of Sample Folder 1*).

ix) Click '**Save**'.



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**'.



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**'.

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.

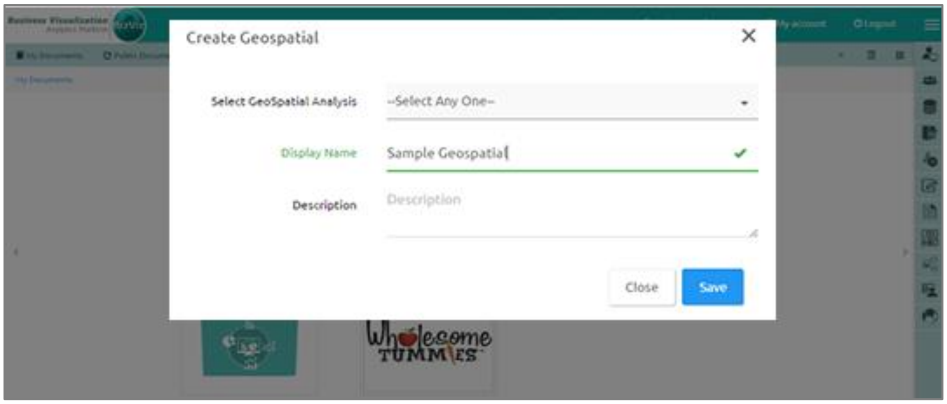
iii) Select '**Create Geospatial**'.

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'.**



vii) The geospatial will be created.

8.1.9. Creating a Report

i) Select a folder.

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

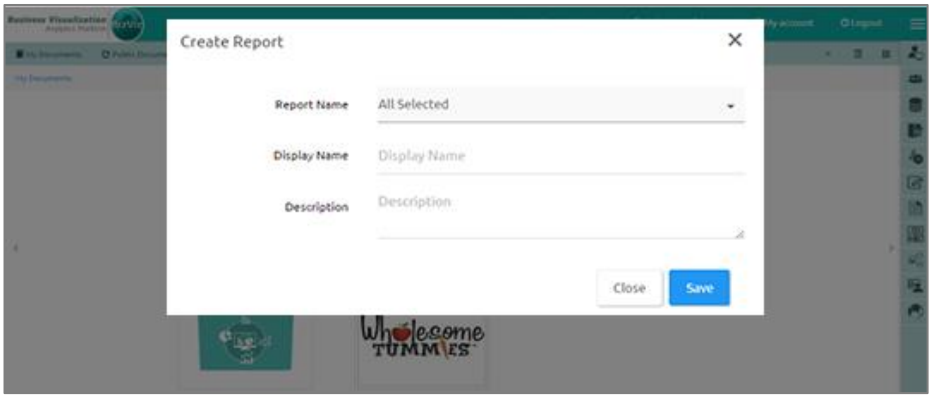
iii) Select **'Create Report'.**

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'.**



vii) The report will be created.

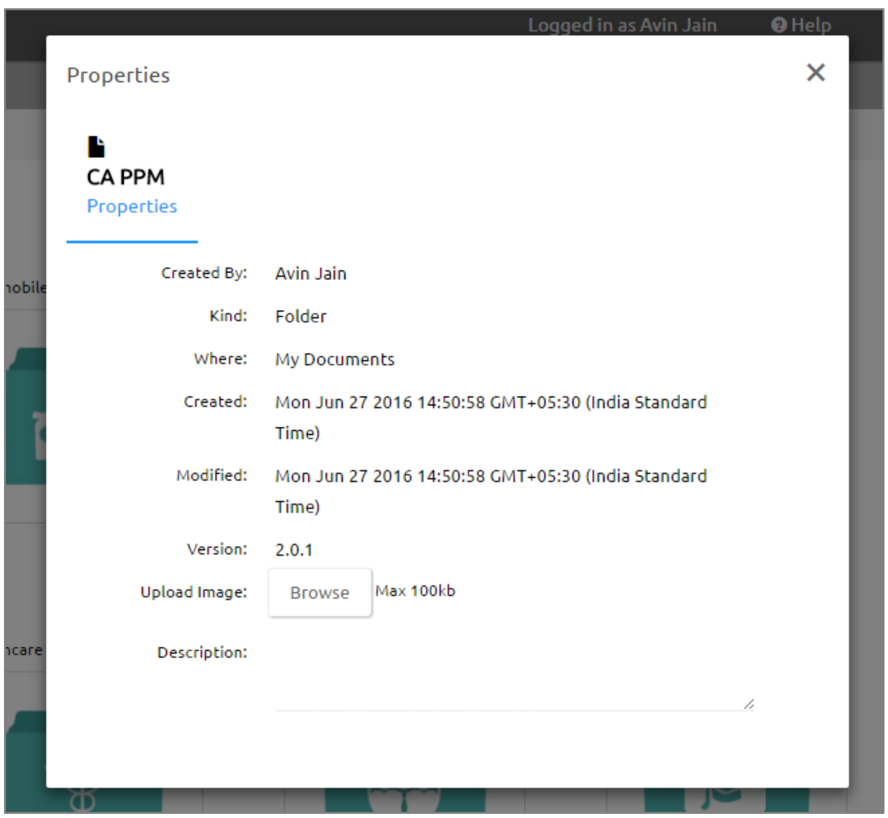
8.1.10. Properties

i) Select a folder.

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

iii) Select ‘**Properties**’.

iv) The folder properties will be displayed.



8.1.11. Creating a Story

i) Select a folder.

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

iii) Select '**Create Story**'.

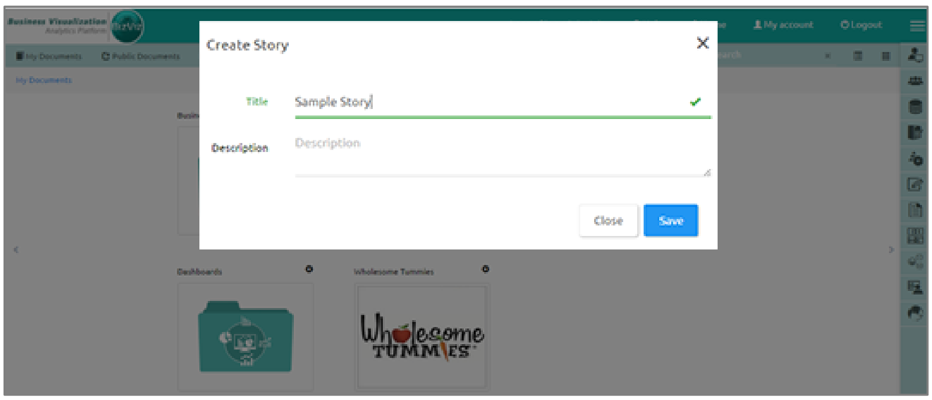
iv) A pop-up window will appear.

v) Fill in the required information:

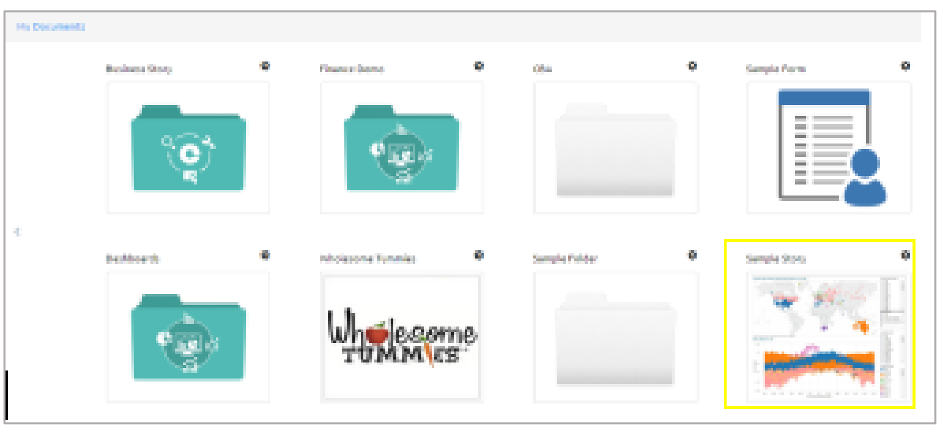
a. **Title**: Enter a title for the story document

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

vi) Click '**Save**'.



vii) The story document will be created.



8.1.12. Moving a Folder

i) Select a folder.

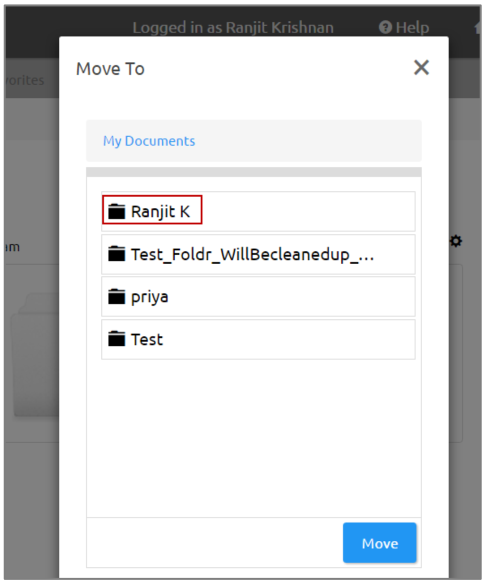
ii) Click the ‘**Settings**’ icon for options.

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.

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.

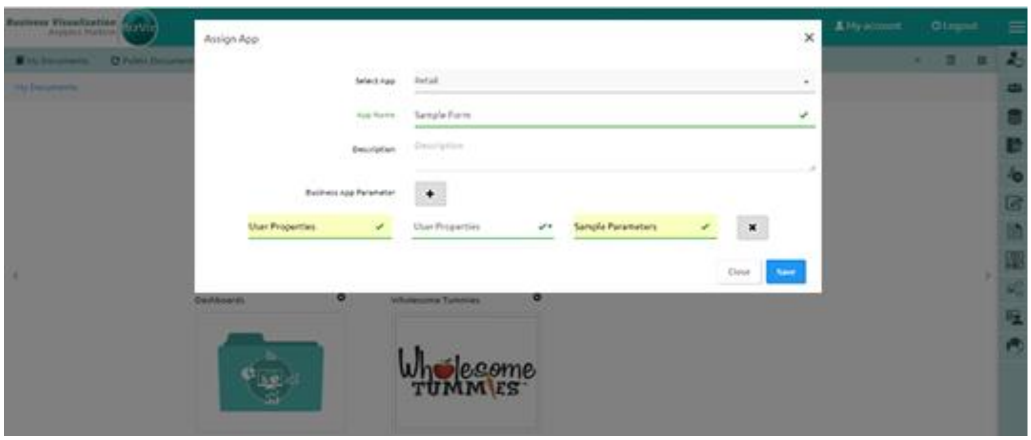
v) Select ‘**Assign App**’ from the context menu.

vi) A pop-up window will appear.

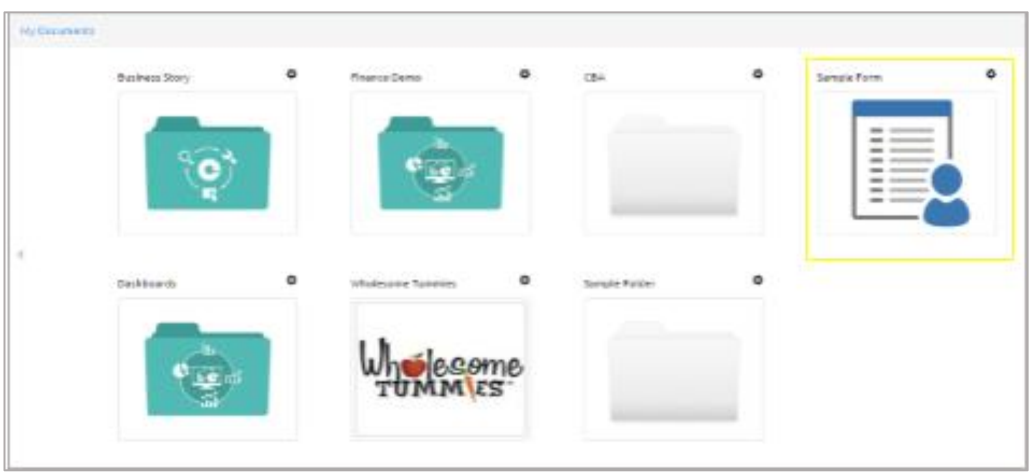
vii) Fill in the following information:

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**’.



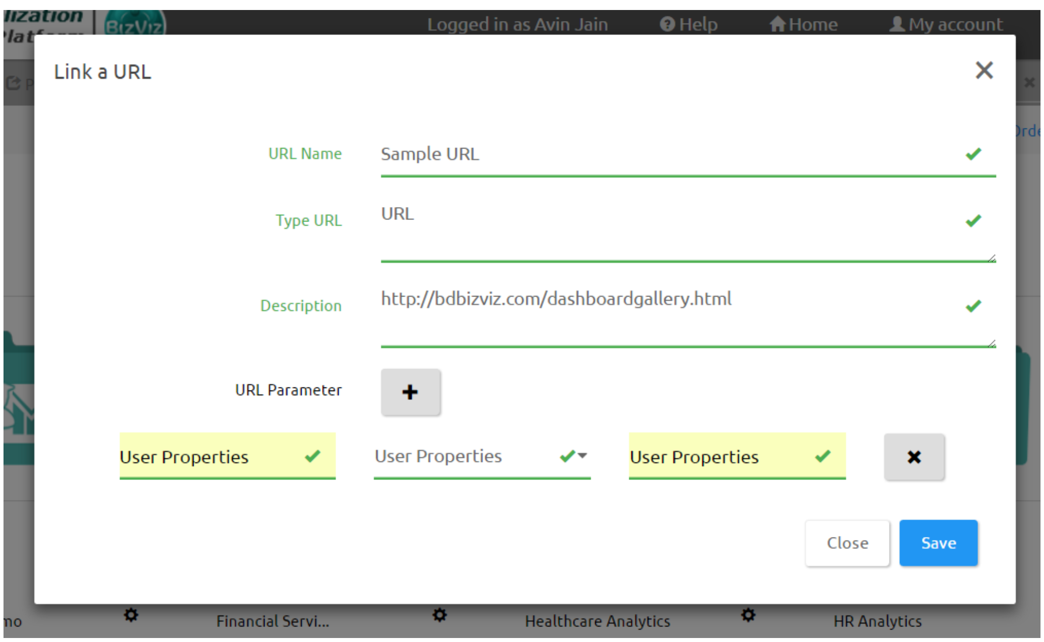
ix) The app will be assigned.



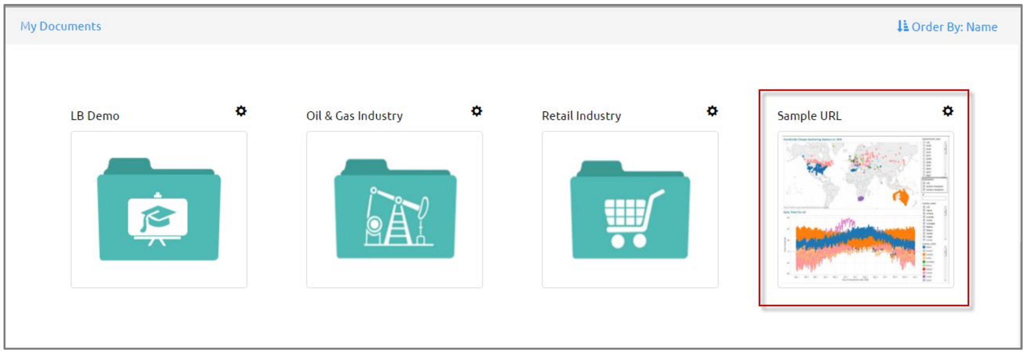
Note: Please refer to the Business App User Guide for more details on Business App.

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**’.



ix) The Link URL will be created.



- **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

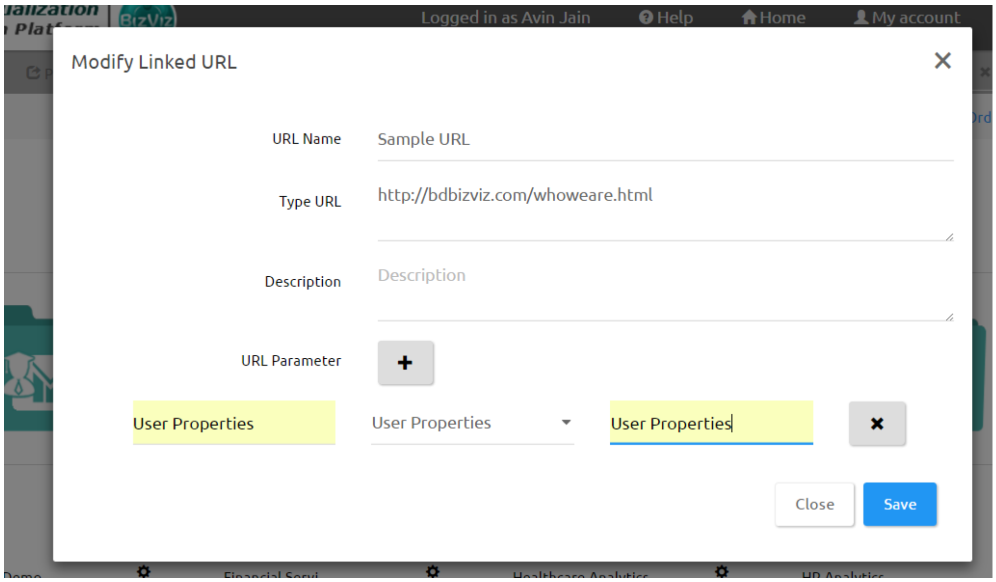
c. Description

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**’.



vii) The modified URL Link will be saved.

8.3.3. Renaming a URL Document

i) Select a linked URL document.

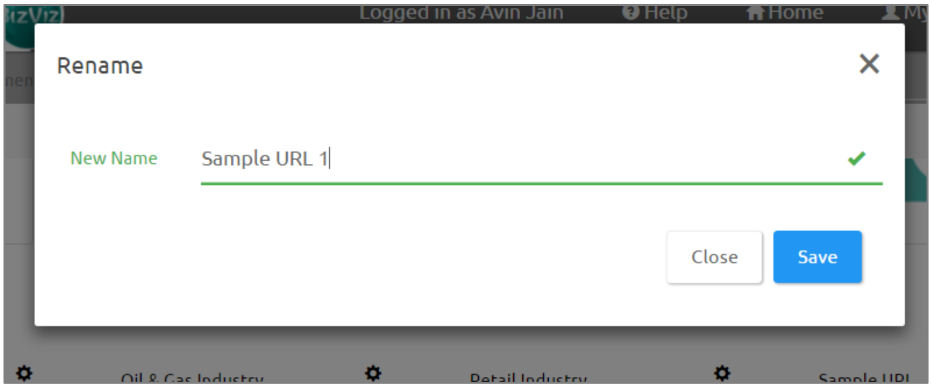
ii) Click the ‘**Settings**’ icon for options.

iii) Select ‘**Rename**’.

iv) A pop-up window will appear.

v) Enter a New Name for the URL document.

vi) Click ‘**Save**’.



vii) The URL document will be renamed successfully.

8.3.4. Deleting a URL Document

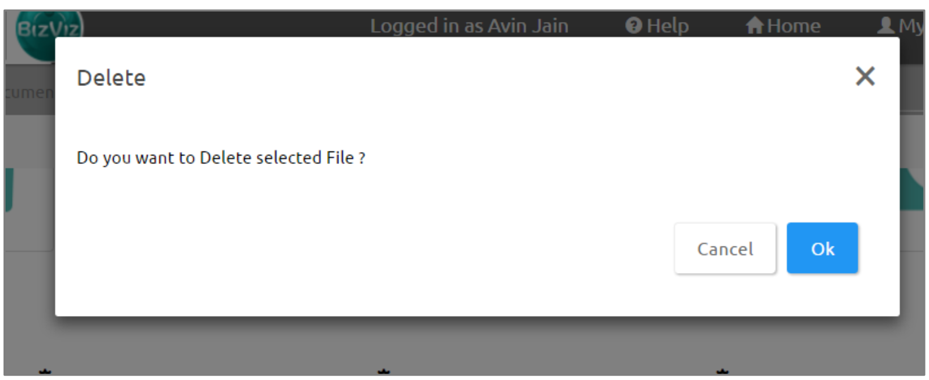
i) Select a linked URL document.

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

iii) Select ‘**Delete**’.

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

v) Click ‘**Ok**’.



vi) The selected URL file will be removed.

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

8.3.5. 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.

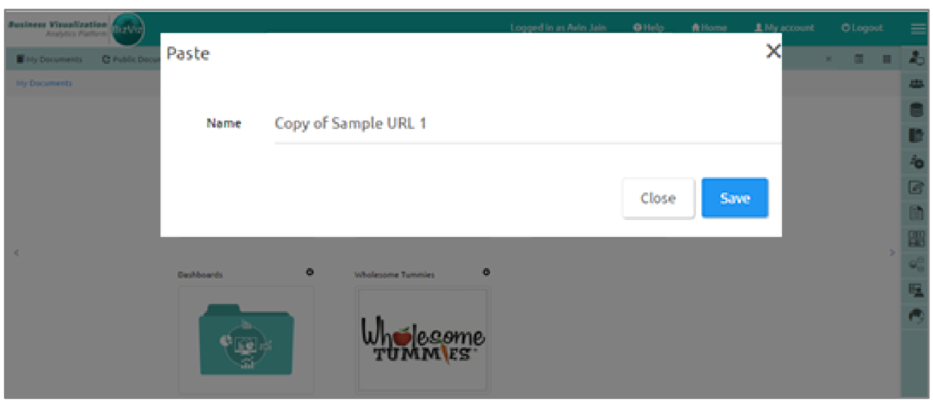
vi) A context menu will appear with the '**Paste**' option.

vii) Select '**Paste**'.

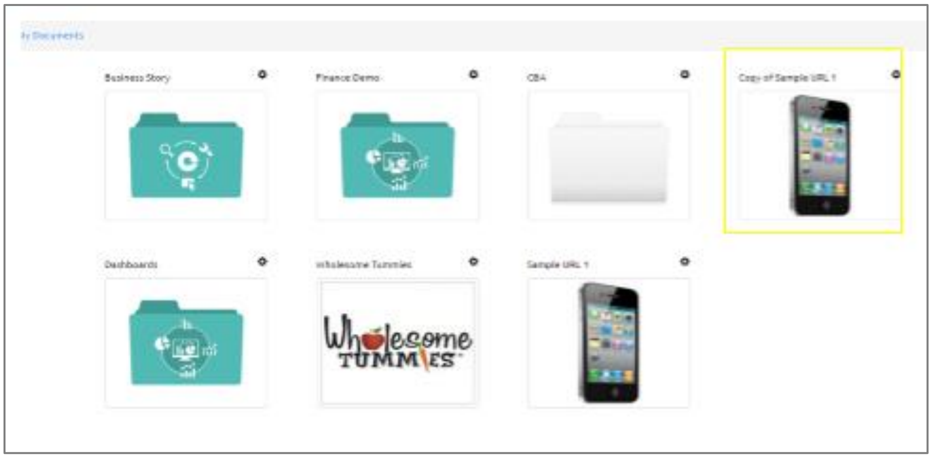
viii) A pop-up window will appear.

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**'.



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



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

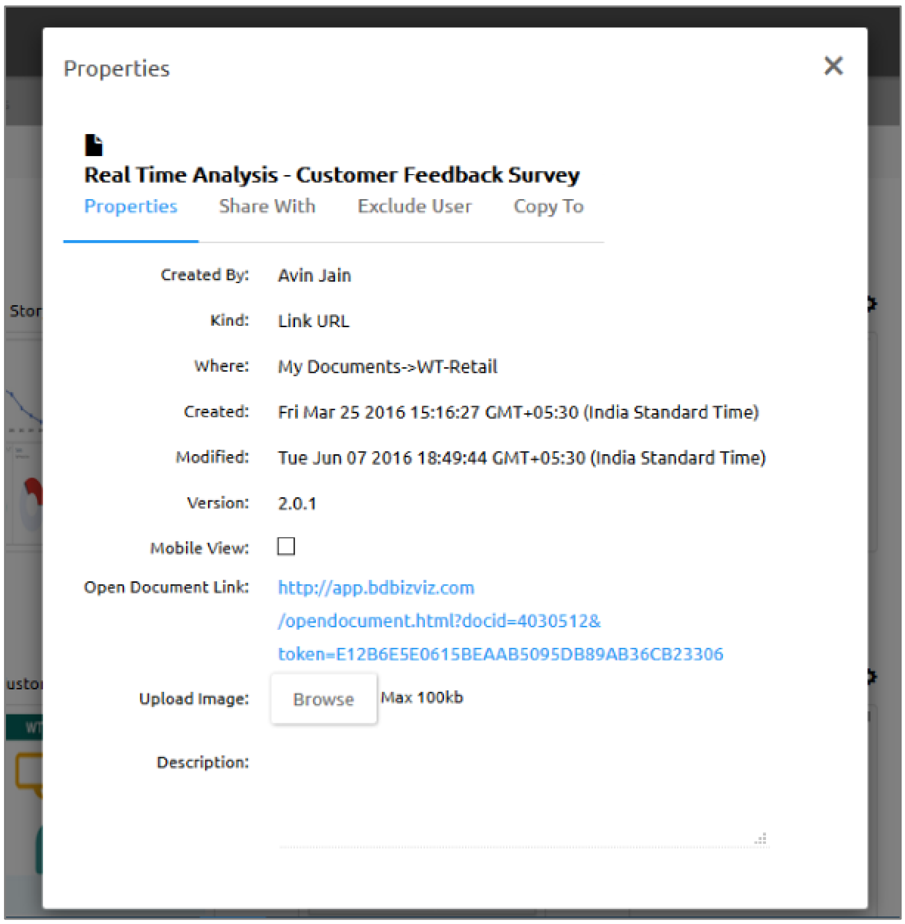
i) Select a linked URL document.

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

iii) Select '**Properties**'.

iv) A pop-up window will appear with 4 options.

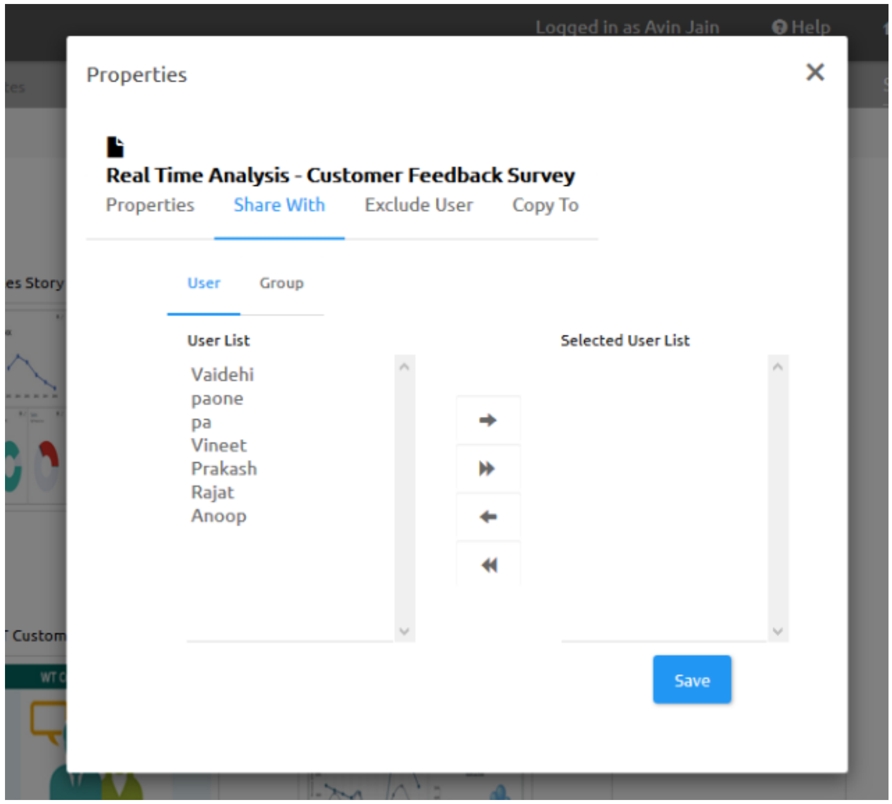
a. **Properties:** Properties of the linked URL documents will be displayed.



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

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

4. Click ‘**Save**’.

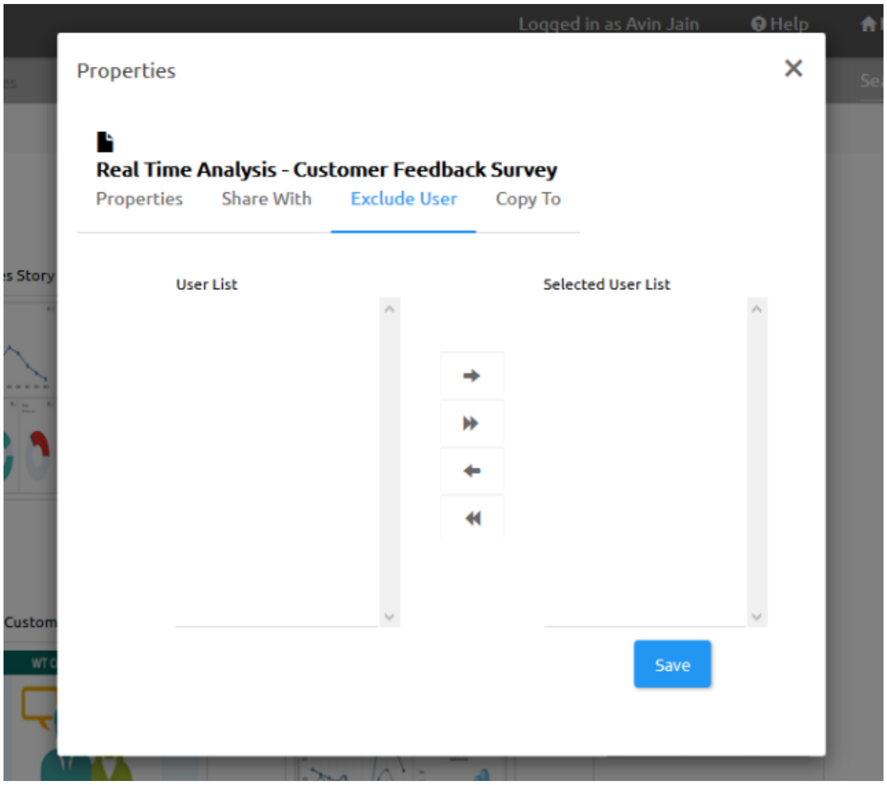


5. The linked URL document will be shared with the selected user or selected user group.

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

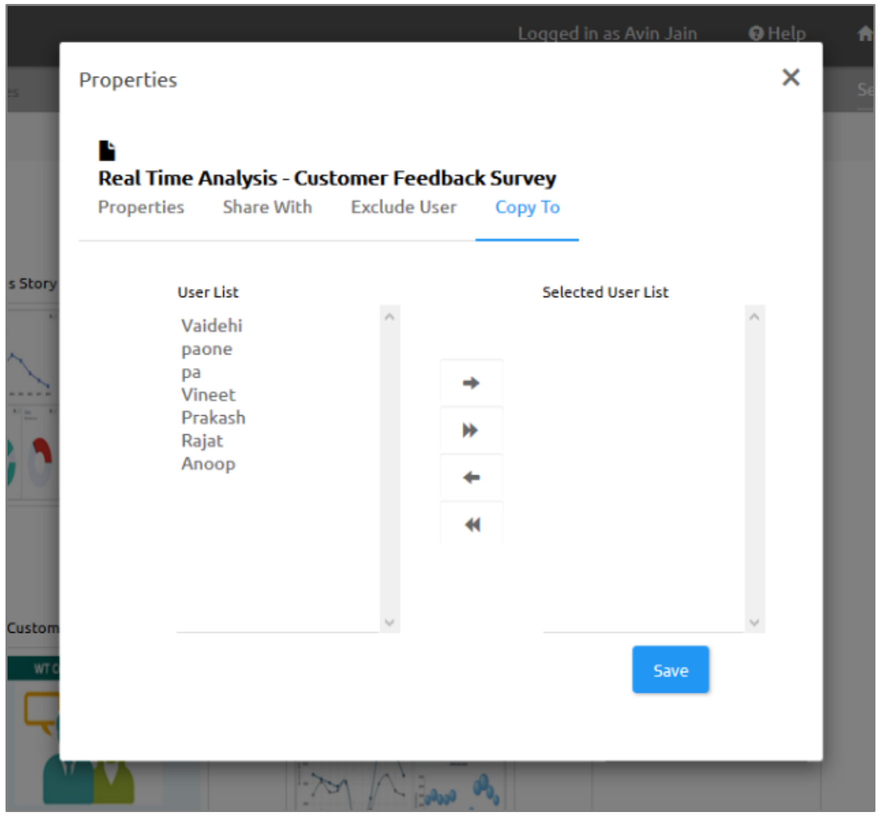
b. Exclude User: The selected user will not be able to access the linked URL file.

1. Select **‘Exclude User’** on the Properties pop-up screen.
2. Select and move a user from **‘User List’** to **‘Selected User List’** using the arrows.
3. Click **‘Save’.**



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

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'.**



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.

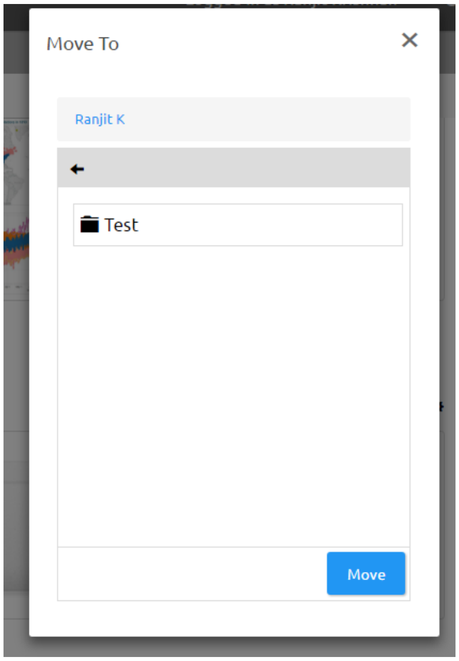
ii) Click the '**Settings**' icon for options.

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

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

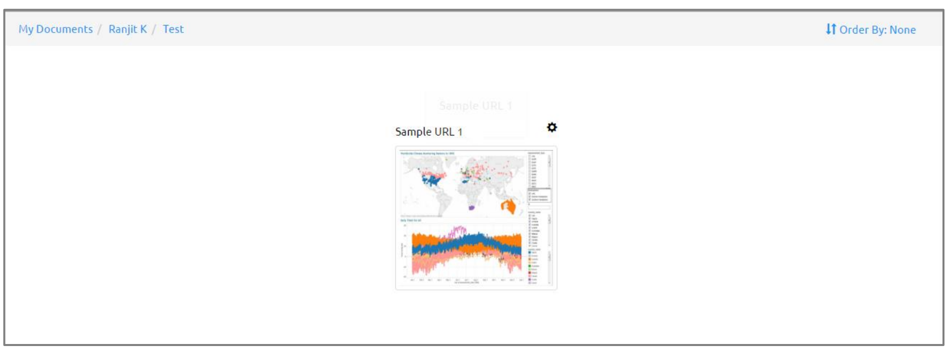
v) Select a folder from the pop-up window.

vi) Click '**Move**'.



vii)A success message will appear.

viii) The desired URL will be moved to the selected space.



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.

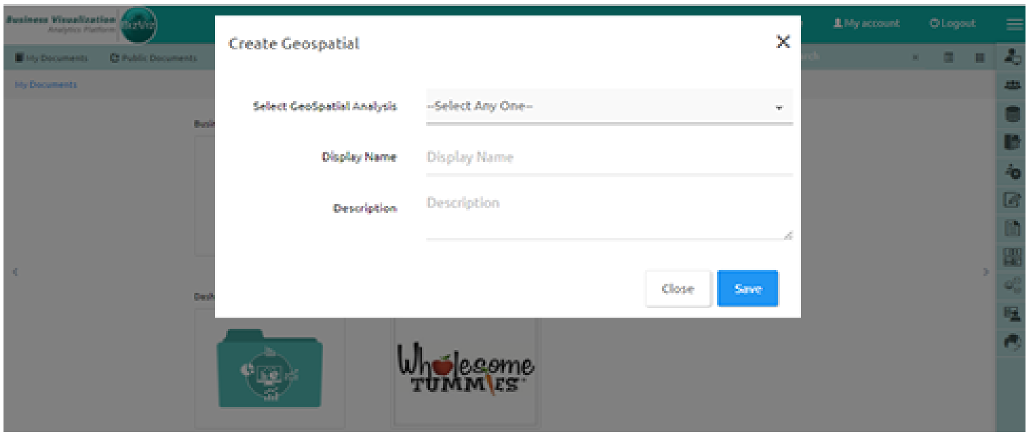
vii) Fill in the following information:

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**'.



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.

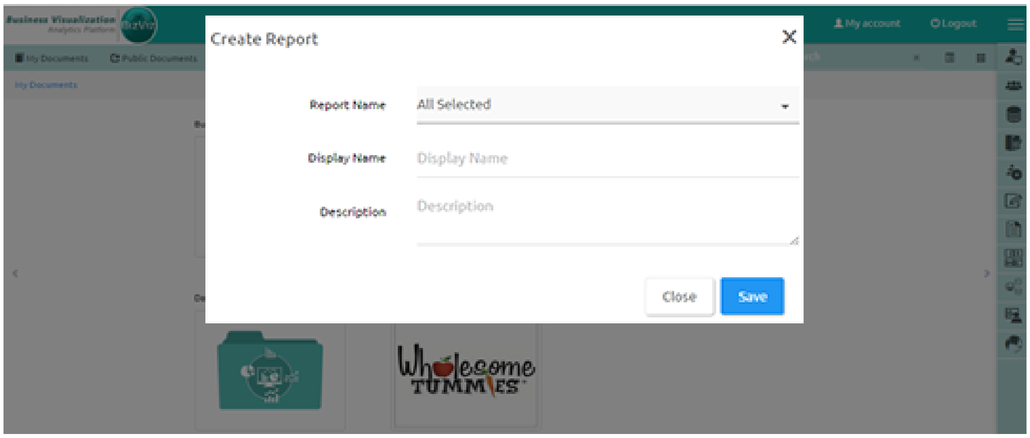
vii) Fill in the following information:

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).

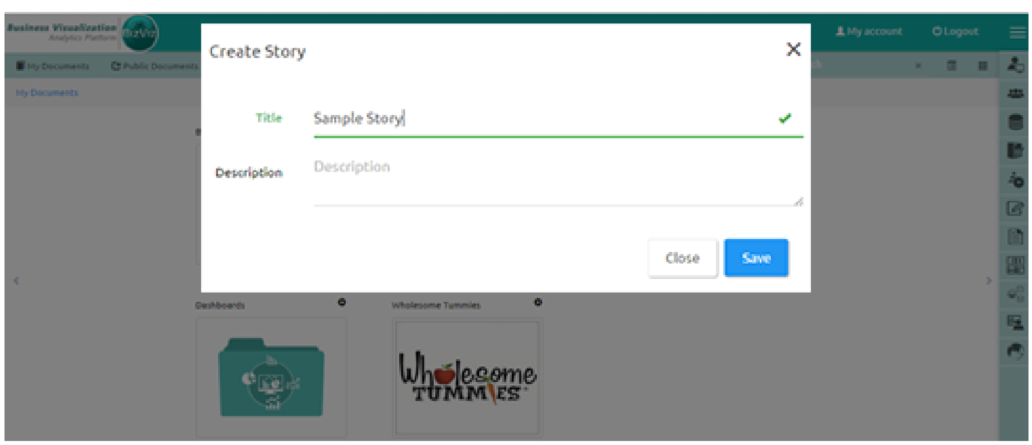
viii) Click '**Save**'.



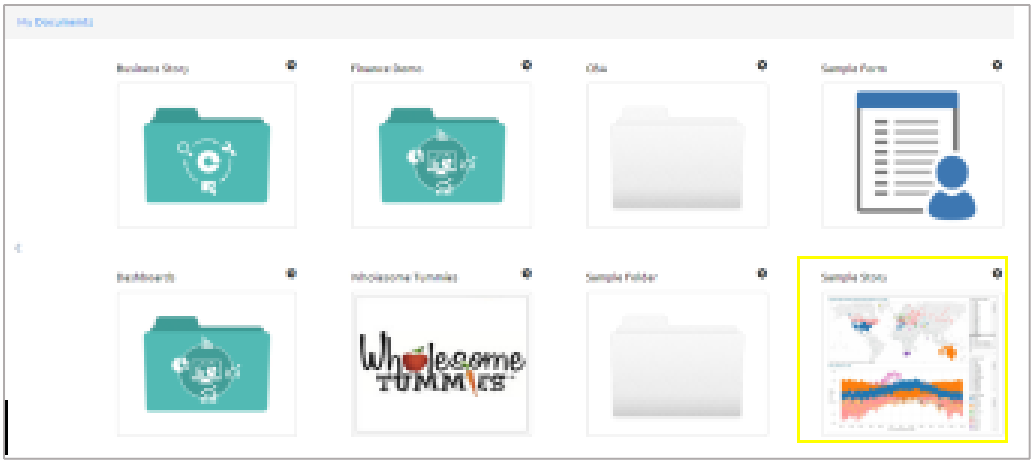
ix) The report will be created successfully.

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**’.



ix) The story document will be created.

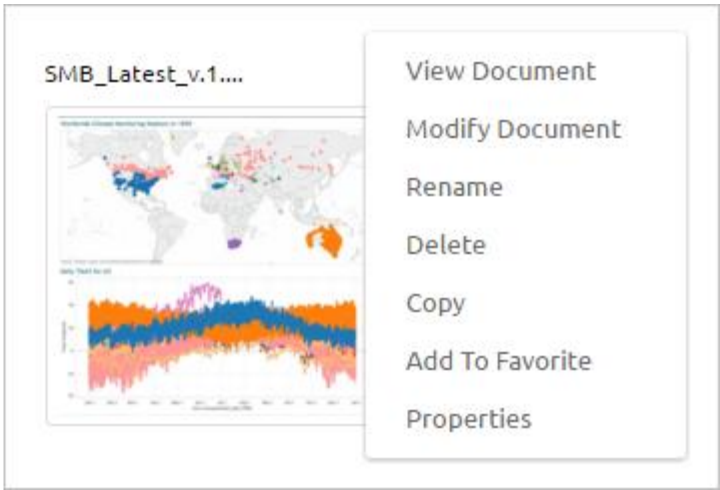


Note: Please refer to the Business Story User Guide for more details on Business Story.

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.

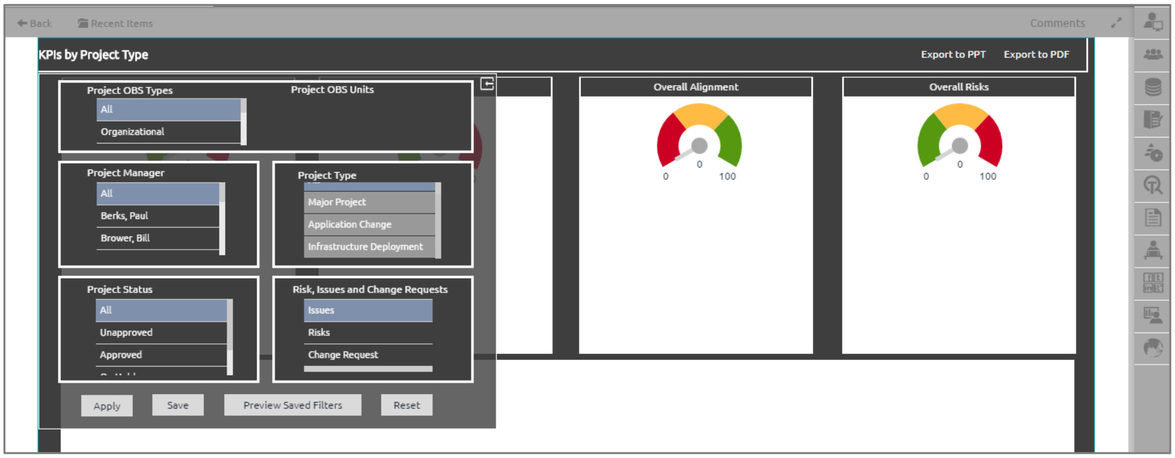


8.7.1. **Viewing a Dashboard**

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

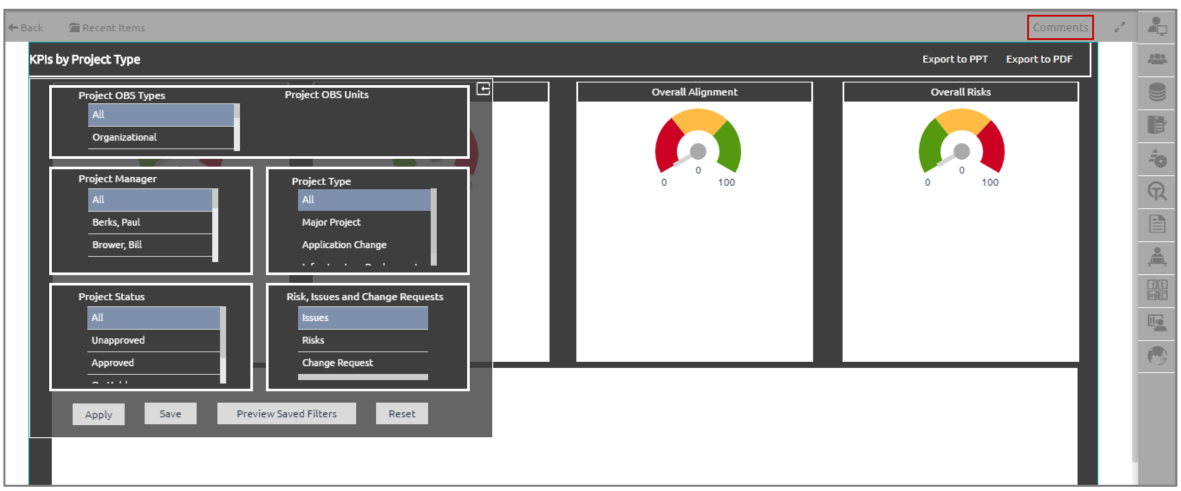
i) Select a dashboard.
ii) Click the '**Settings**' icon for options.
iii) Select '**View Document**'.
iv) The Dashboard screen will be displayed.
v) The following options will be provided on a dashboard screen to facilitate users:
   - **Back:** Redirect users back to the selected dashboard.
   - **Recent 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.

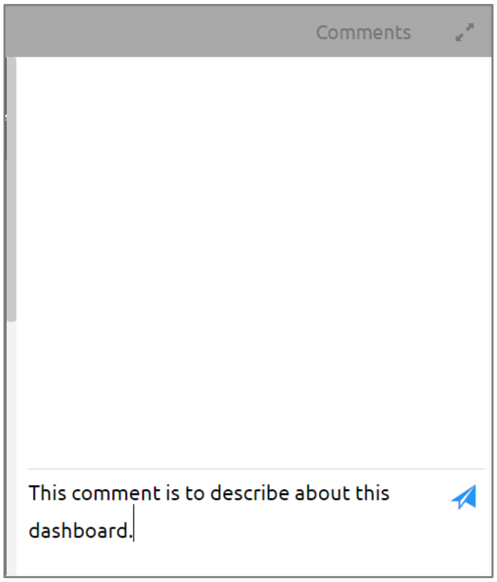


- **Steps to Insert a Comment**

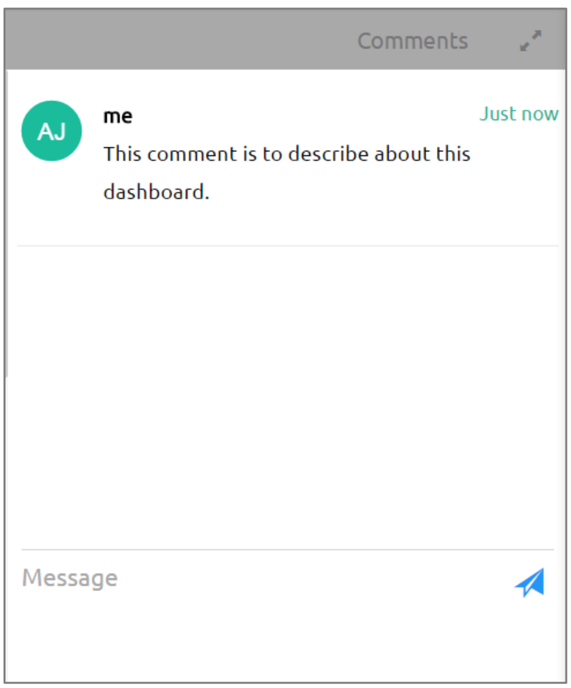
  i) Click '**Comments'** on the View Document screen**.**



  ii) A new window will open below.
  iii) Space to insert a message can be seen at the end of the window.
  iv) Type a comment in the given '**Message**' space.
  v) Click '**Send**'.



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



Note:

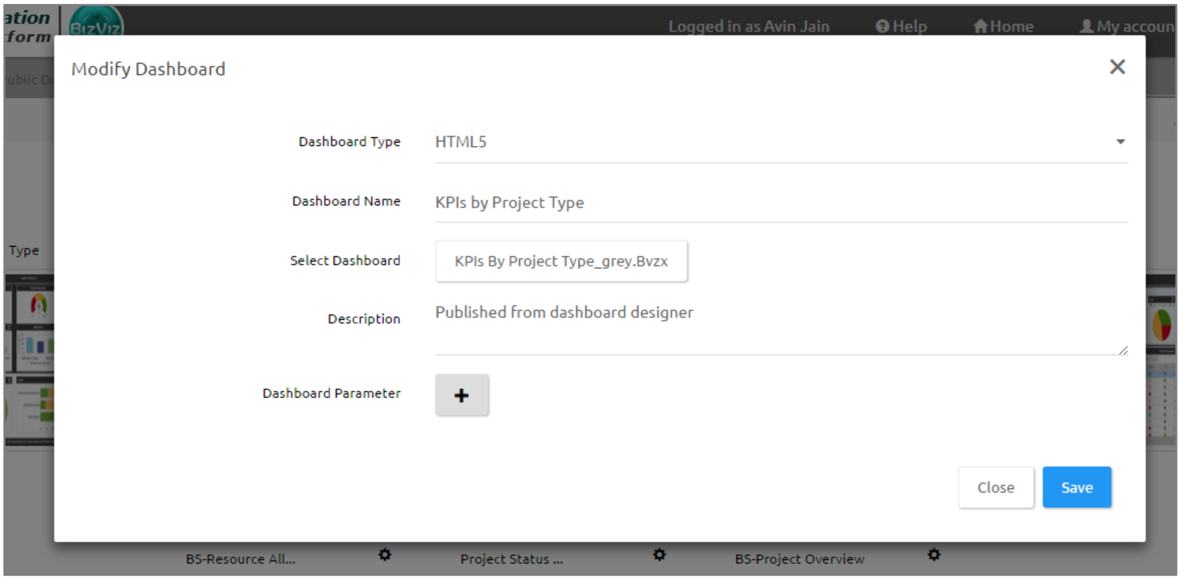
a. Comments can be entered by all the users who have access to the dashboard document.

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

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**'.



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.

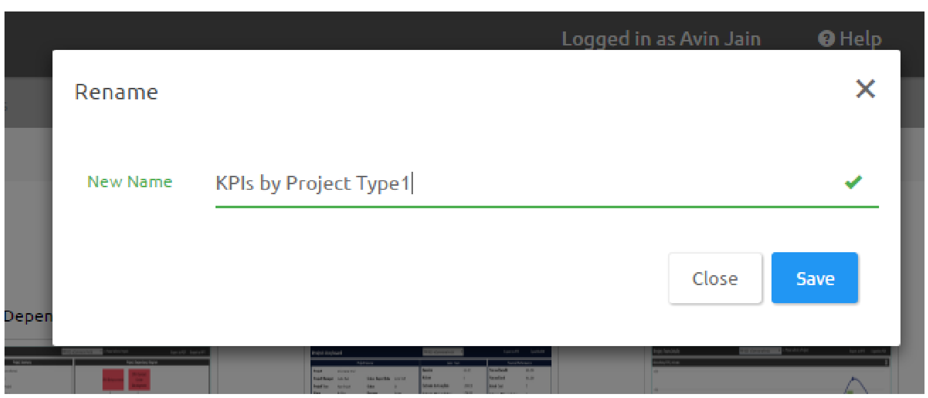
ii) Click the '**Settings**' icon for options.

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.

8.7.4. Deleting a Dashboard

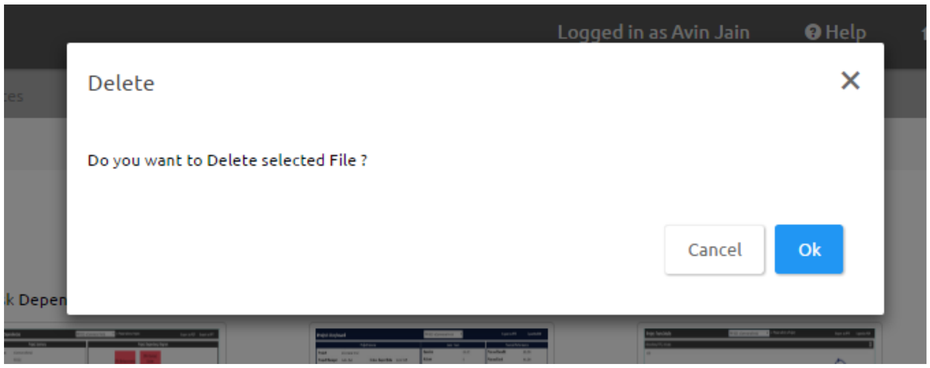
i) Select a dashboard.

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

iii) Select '**Delete**'.

iv) A new window pops-up to confirm deletion.

v) Click '**Ok**'.



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.

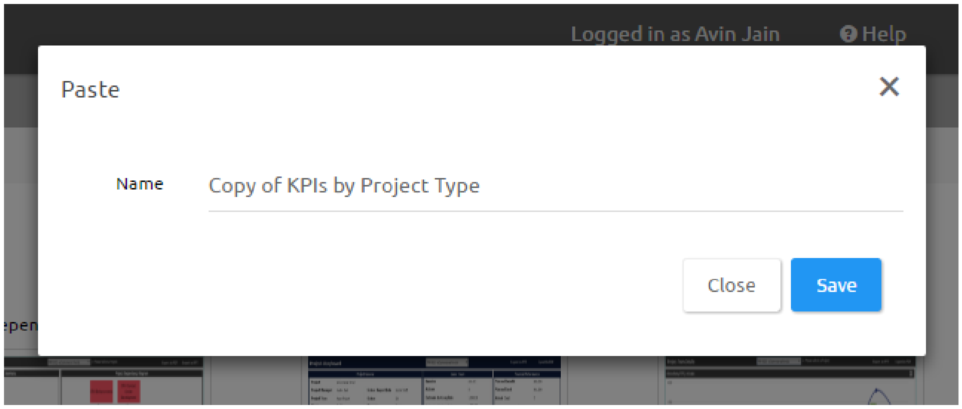
vi) A context menu will appear with the '**Paste**' option.

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**'.



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

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

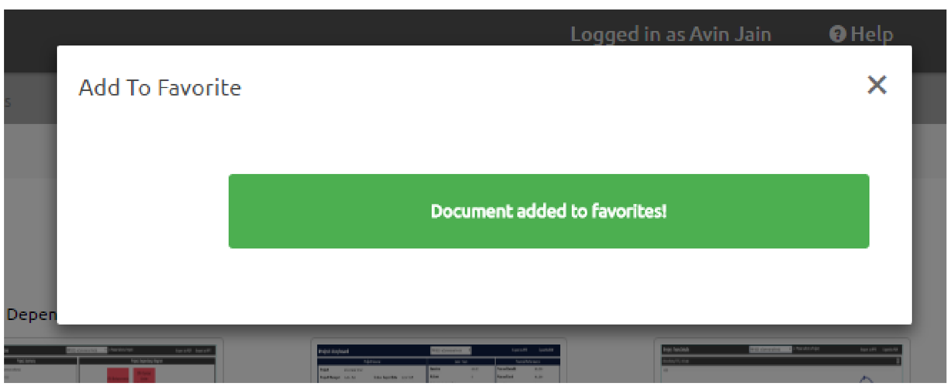
Administrators can add a dashboard to or remove it from '**Favorites**'.

i) Select a dashboard.

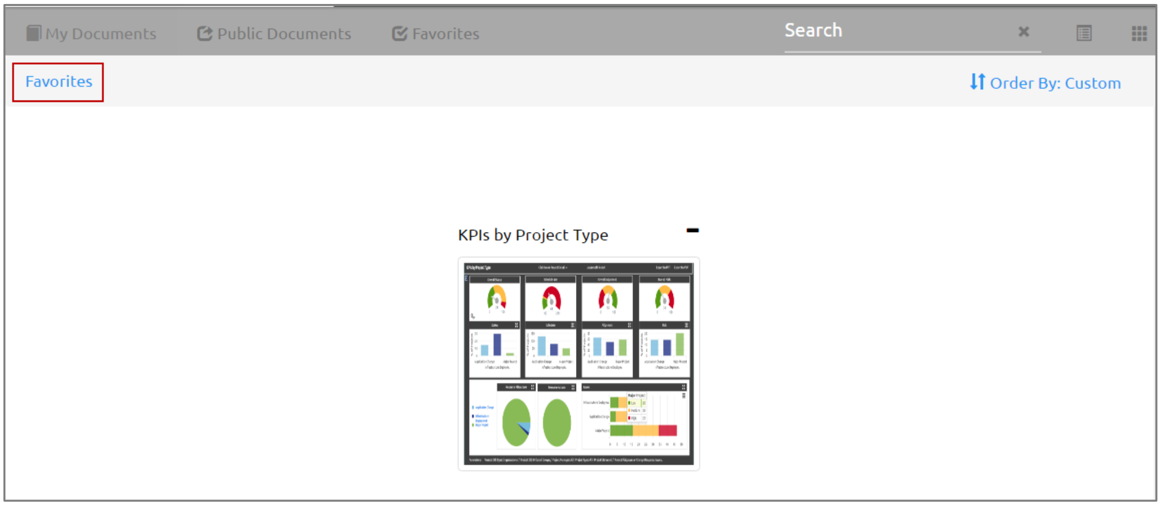
ii) Click the '**Settings**' icon for options.

iii) Select '**Add to Favorites**'.

iv) A pop-up window will appear with a message, "**Document added to favorites!**".



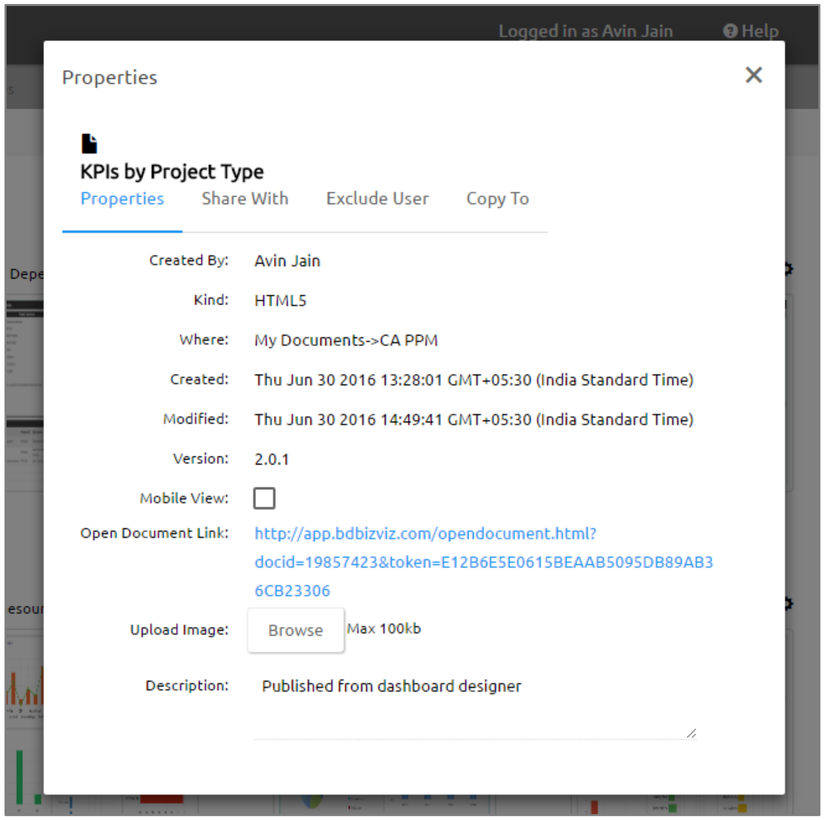
v) The selected dashboard will be added to '**Favorites**'.



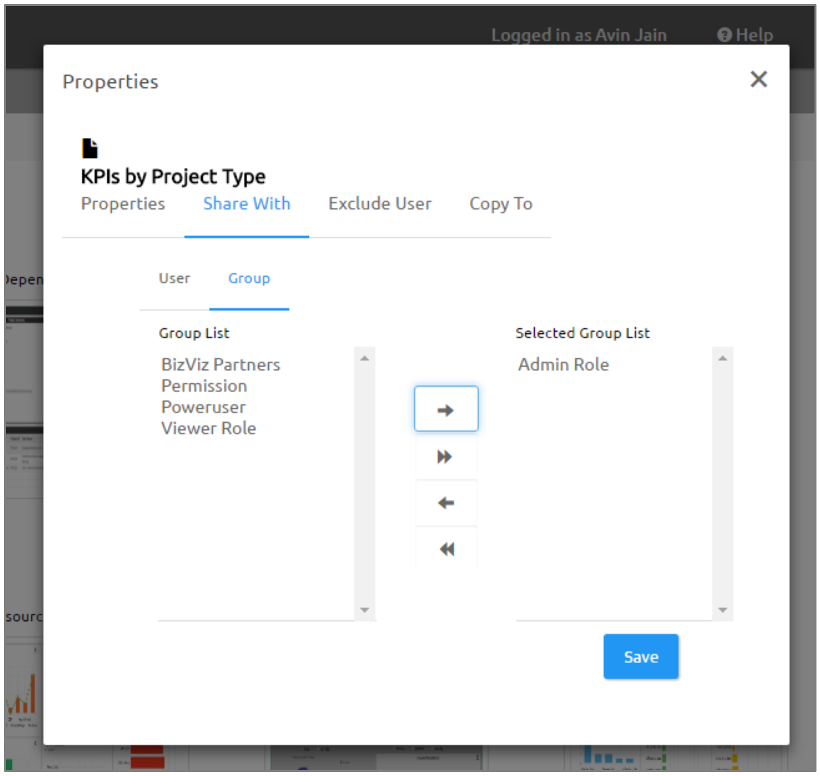
vi) Open ‘**Favorites**’.
vii) Select the dashboard you wish to remove from ‘**Favorites**’.
viii) Click on the ‘**Remove**’ button.
ix) A pop-up window will appear with a message, “**Document removed successfully**!”.
x) The dashboard will be removed from ‘**Favorites**’.

8.7.7. 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.



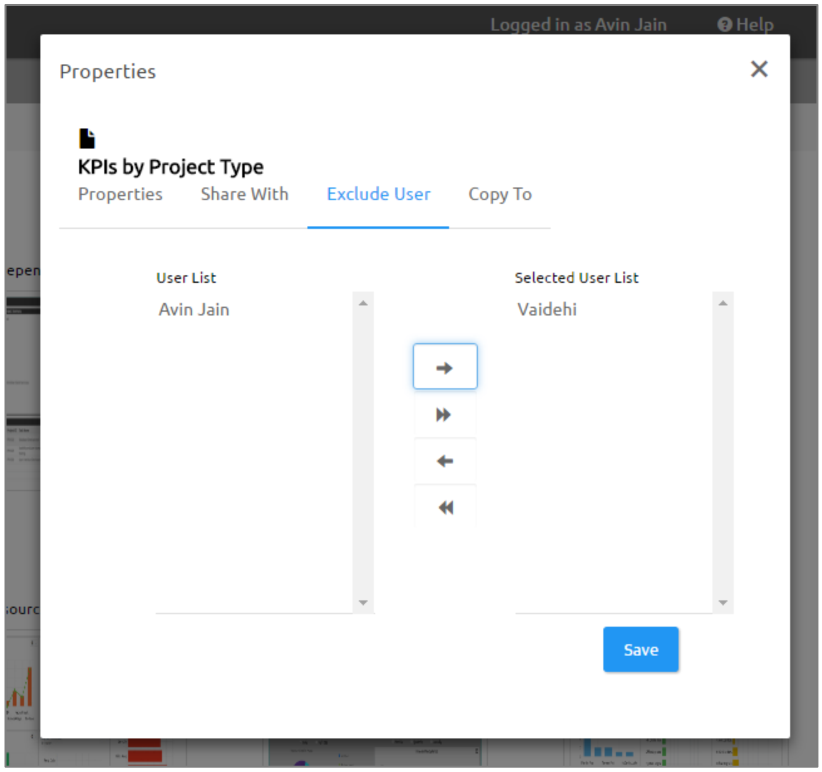
- **Share With:** The dashboard will be shared with the selected user or user group.
   1. Select '**Share With**' on the Properties pop-up screen.
   2. Select a user or group from either the '**User List**' or '**Group List**'.
   3. Move the selected user or group to the '**Selected User List**' or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



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

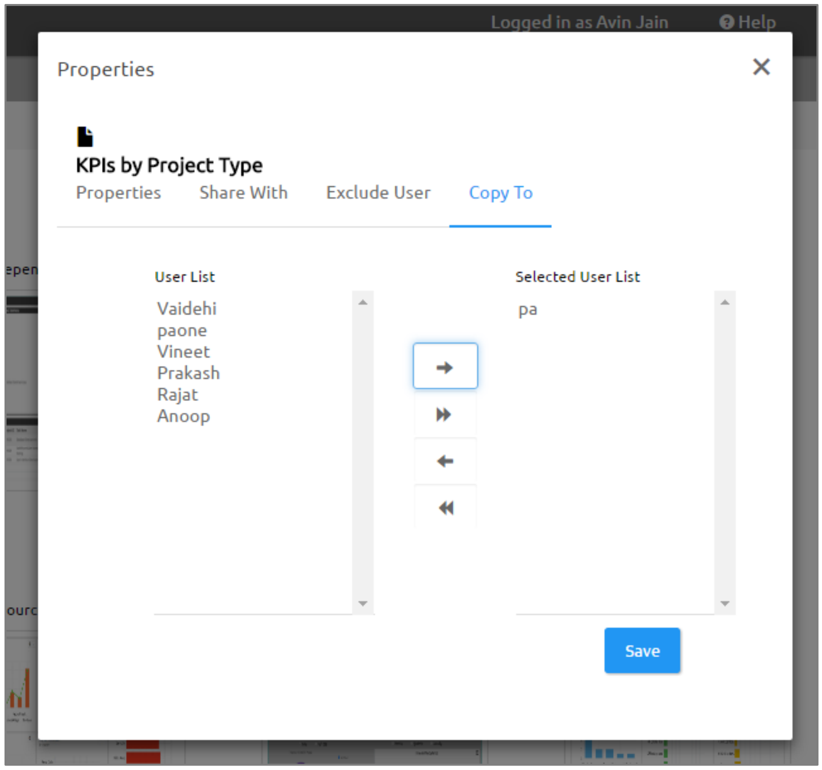
Note: If a dashboard document is shared using this option, then the selected users and user groups will receive a view only copy.

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



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

- **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.

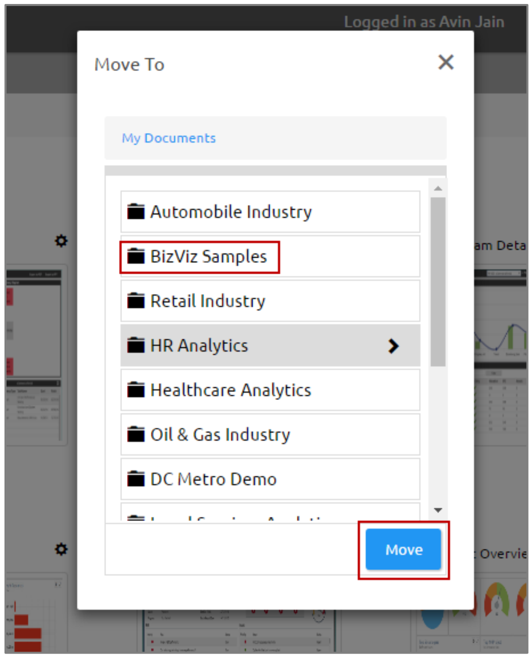
ii) Click the '**Settings**' icon for options.

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

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

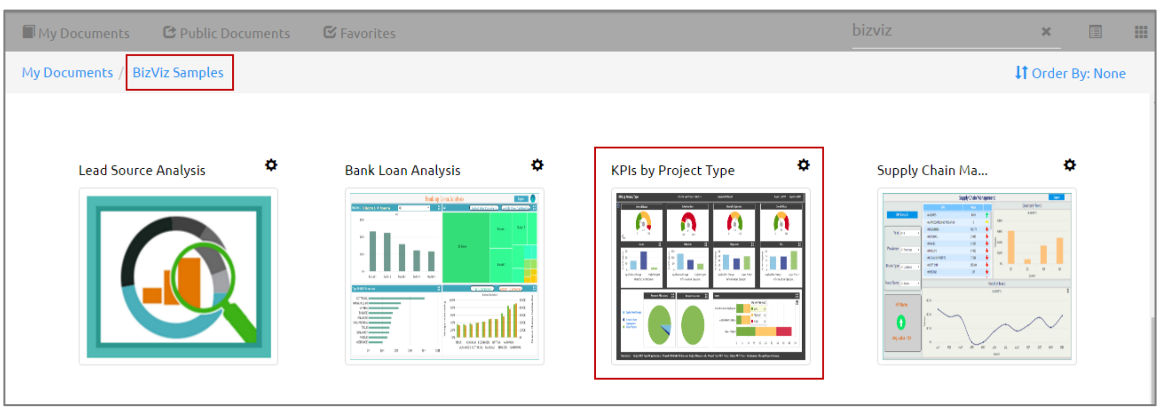
v) Select a folder from the pop-up window.

vi) Click '**Move**'.



vii) A success message will appear.

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



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

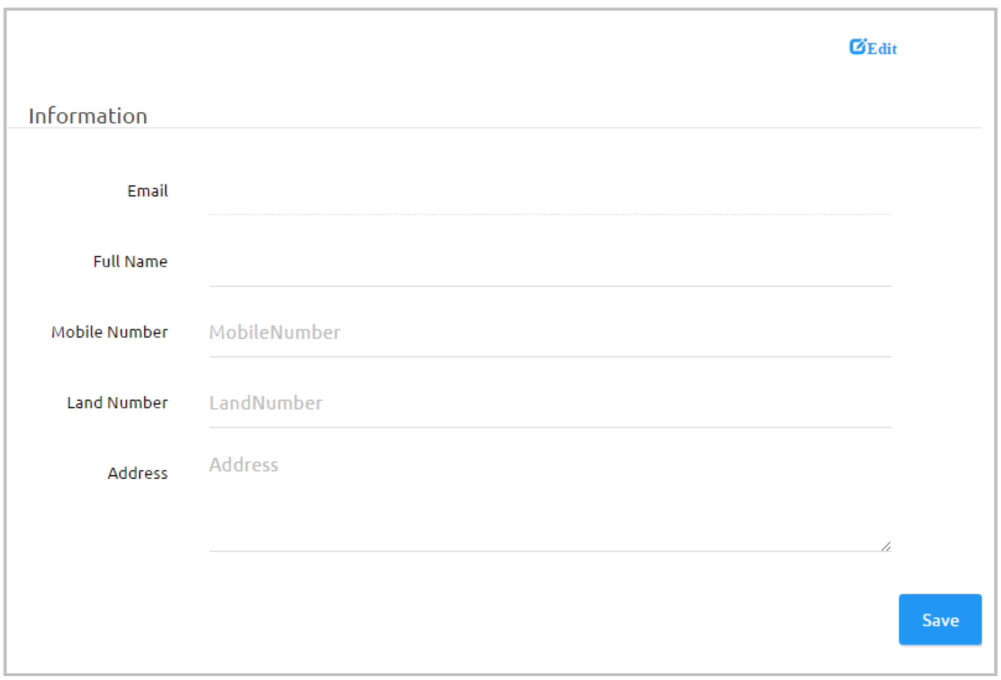
This module displays personal information about the user.

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**’.



iv) The user information will be saved.

Note:

a. It is mandatory to click ‘**Edit**’ to enter the user information in the given fields.

b. Use ‘**Edit**’ option to modify/change the user information.

Steps to edit the Information:

Click '**Edit**' -> Modify/ Change the details -> Click '**Save**'

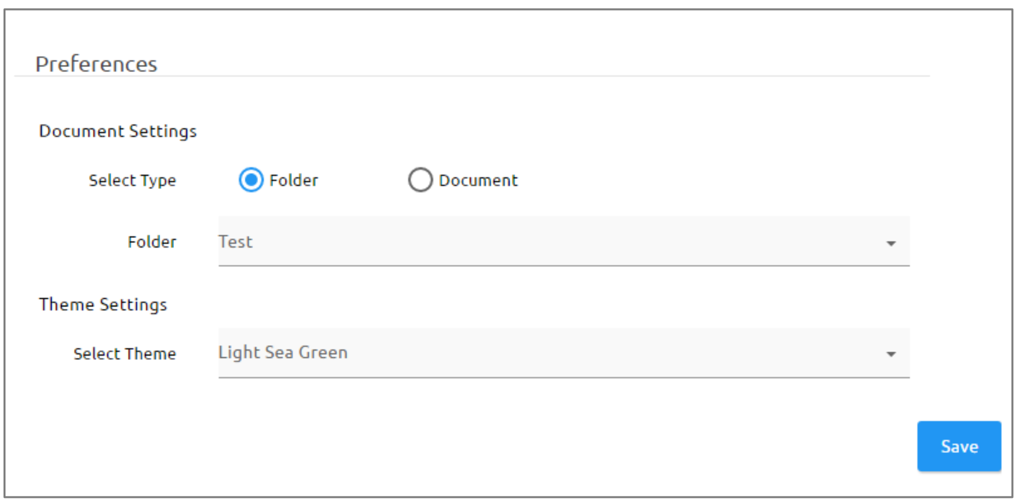
c. Except email address, all the other profile information can be modified from the '**Information**' module.

9.2. Preferences

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.



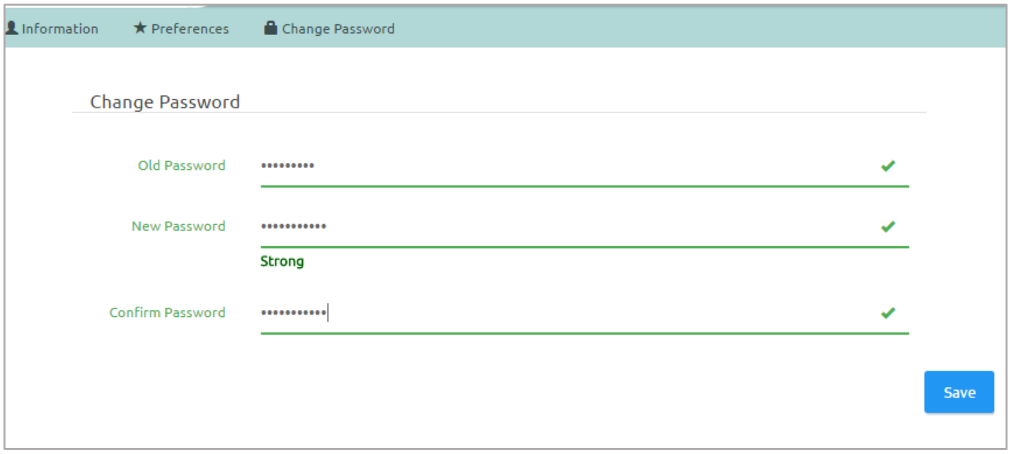
9.3. Changing Password

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

i) Click '**Change Password**' on the My Account menu row.
ii) A new page opens.

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

iv) Click '**Save**'.



v) The password will be changed 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.

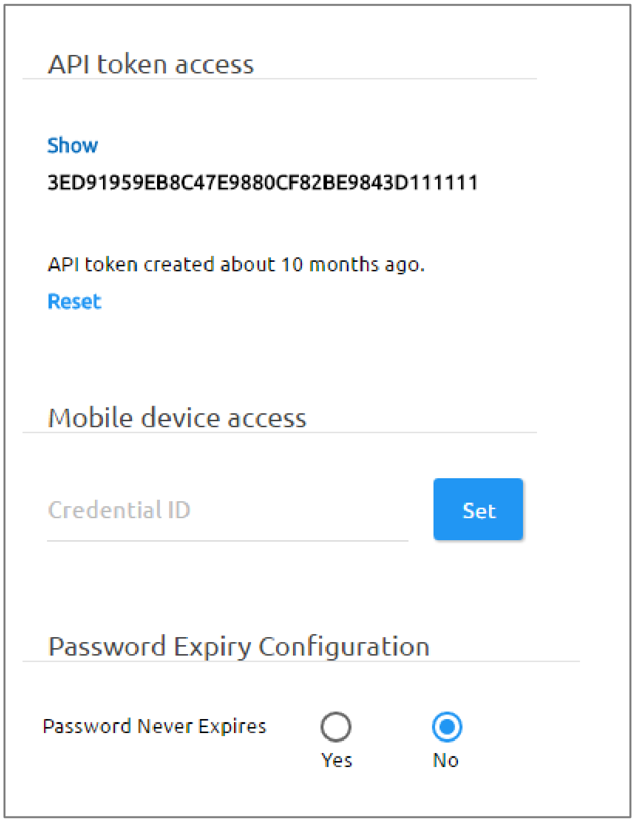
b. Mobile Device Access

- 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**'.



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 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.

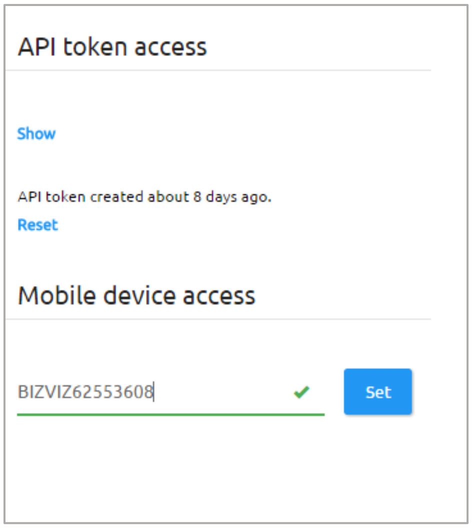
   E.g. everybody should be able to see the platform page, but with their assigned projects and functionalities.

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.

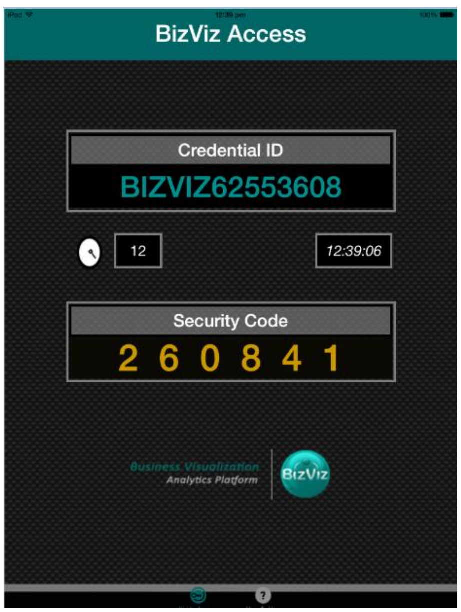
Steps to Access and Use Mobile Authentication

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.



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**’.

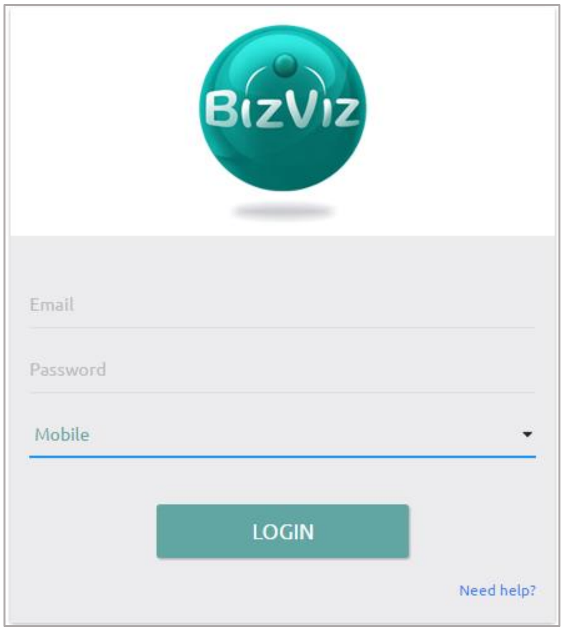


vii) Navigate to the platform login page.

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.



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.

