



BizViz User Guide

Business Story

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 Business Story 2.0	February 21 st , 2016	First release of the document
BizViz Business Story 2.1	May 25 th , 2016	Updated document
BizViz Business Story 2.5	November 9 th , 2016	Updated document

1.2. Overview

This guide covers:

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

1.3. Target Audience

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



2. Introducing BizViz Business Story

2.1. Introduction

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

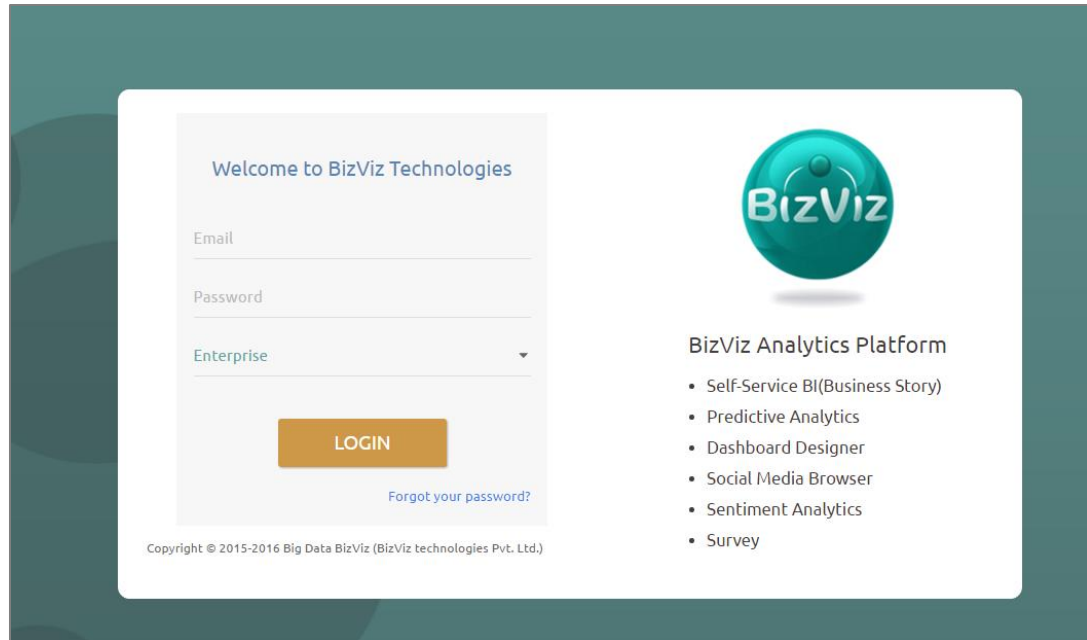
2.2. Prerequisites and Supported Devices

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

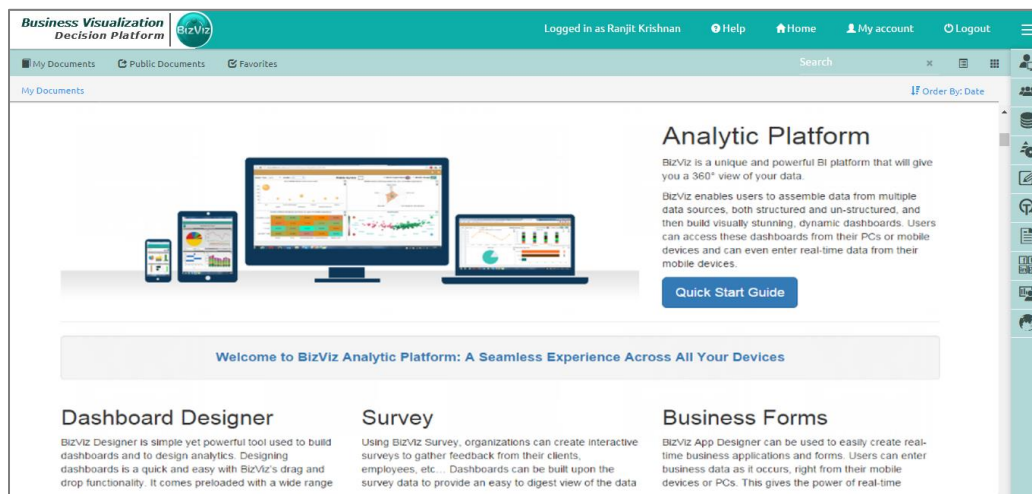
3. Getting Started with BizViz Business Story

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

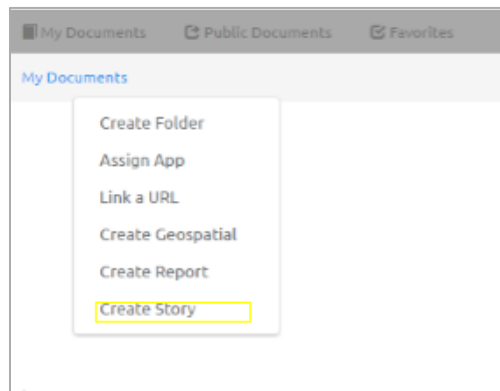
- i) Open BizViz Enterprise Platform Link: <http://apps.bdbizviz.com/app/>
- ii) Enter your credentials to login
- iii) Click '**LOGIN**'



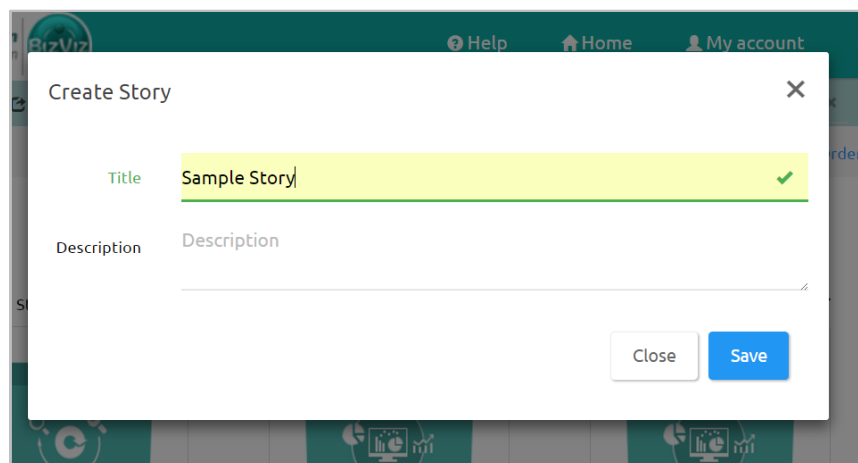
iv) BizViz Platform home page will open



- v) Select 'My Documents' or 'Public Documents'
- vi) Right Click anywhere on 'My Documents' or 'Public Documents'
- vii) A context menu opens
- viii) Select 'Create Story' option from the context menu



- i) A new window pops-up
- ii) Fill in the following information:
 - a. **Title:** Enter a title for the story document
 - b. **Description:** Describe the story document (optional)
- iii) Click 'Save'



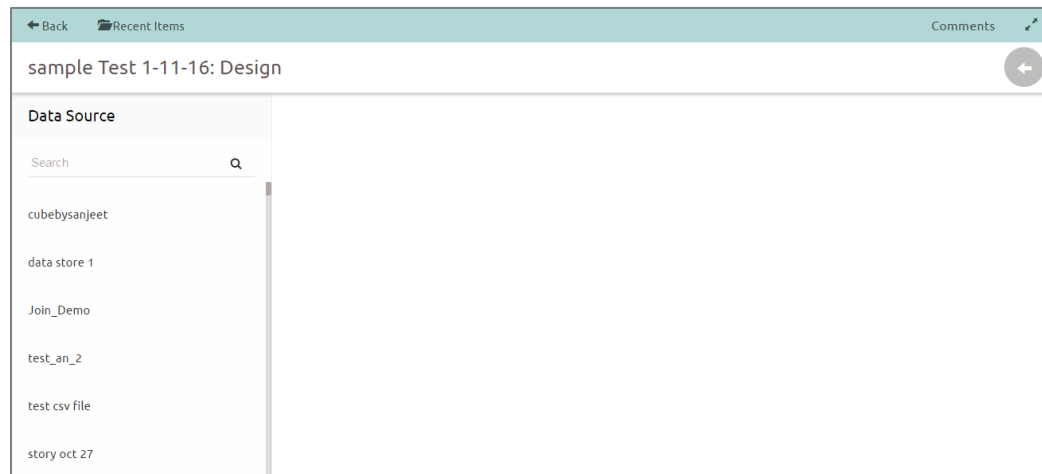
- iv) The story document will be created.

4. Designing a Business Story

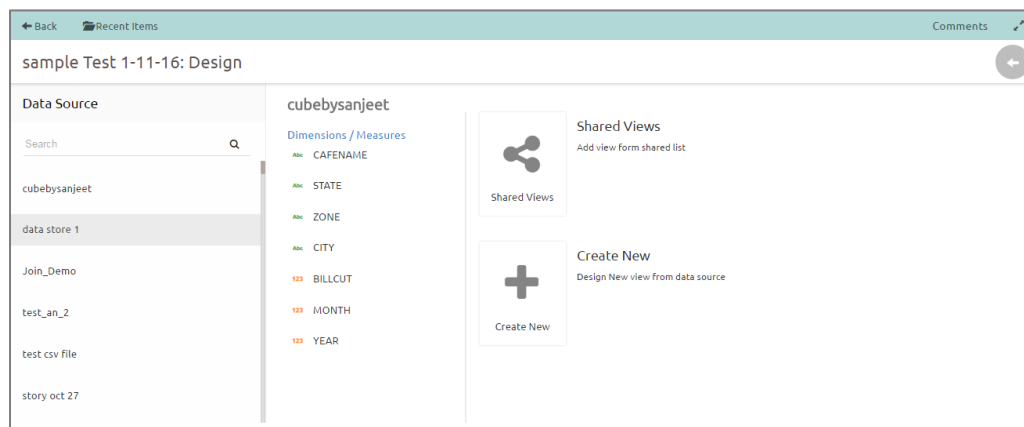
4.1. Selecting a Data Source

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

- i) By clicking 'Save' on the 'Create Story' pop-up window.
- ii) Users will be redirected to a list of data source (in form of data stores).
- iii) Select a data source (data store) from the list.





- iv) On selecting a data source (data store), the following information will be displayed:
- A Dimensions/Measures list for the selected data source
 - 'Shared Views' option to add an existing view on the story board
 - 'Create New' option to create a new view




Note:

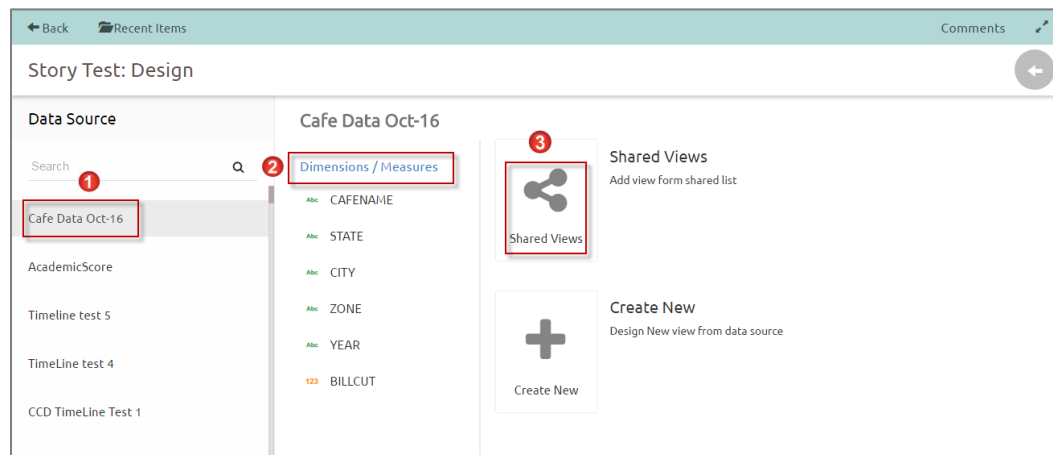
- Enter a data store name in the 'Search' bar to search it from the data source list.
- 'Back' options:


- By clicking the 'Back' option  provided on the menu row redirects users to 'My Documents' or 'Public Documents'.
- By clicking the 'Back' icon  users will be directed to the Story Board.

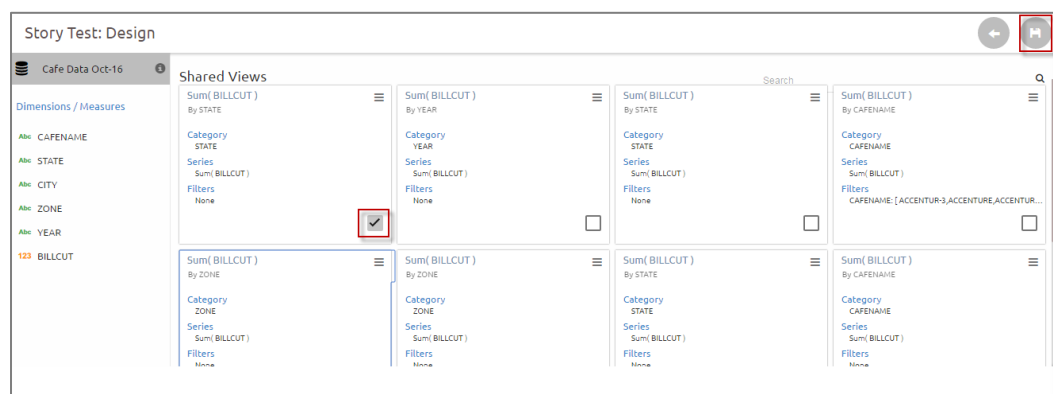
4.2. Sharing a View

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

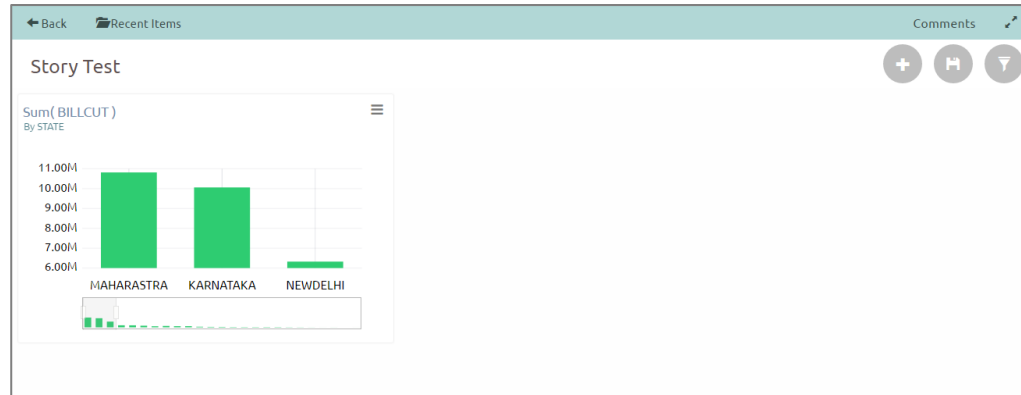
- i) Select a data source from the Data Source list.
- ii) All the available Dimensions/Measures will be listed by default.
- iii) Click **'Shared Views'**  option.



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





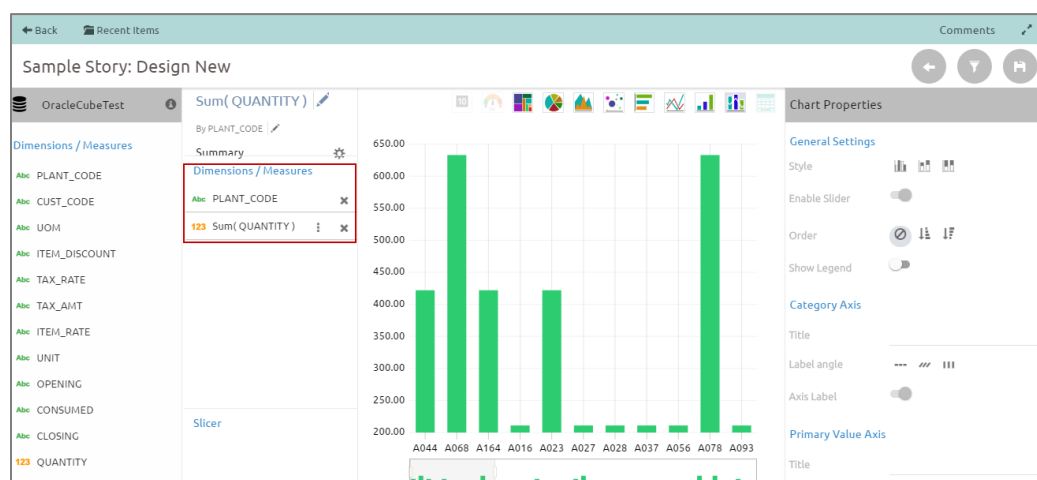
- vii) The selected shared view will be added to the Storyboard.



4.3. Creating a New View

This option will redirect user to the view designer page to create a new view based on the selected data source.

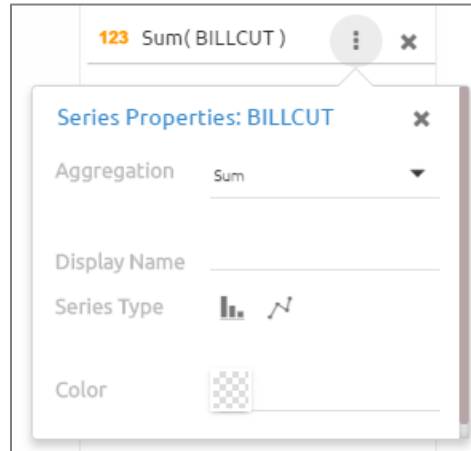
- i) Select a data source (data store) from the data source list.
- ii) All the available Dimensions/Measures will be listed by default.
- iii) Click 'Create View' .
- iv) Users will be redirected to design a new view.
- v) Use drag and drop action to select dimensions/measures from the selected data store.
- vi) Based on the selected dimensions/measures a view will be created instantly.
- vii) Click 'Save' .



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

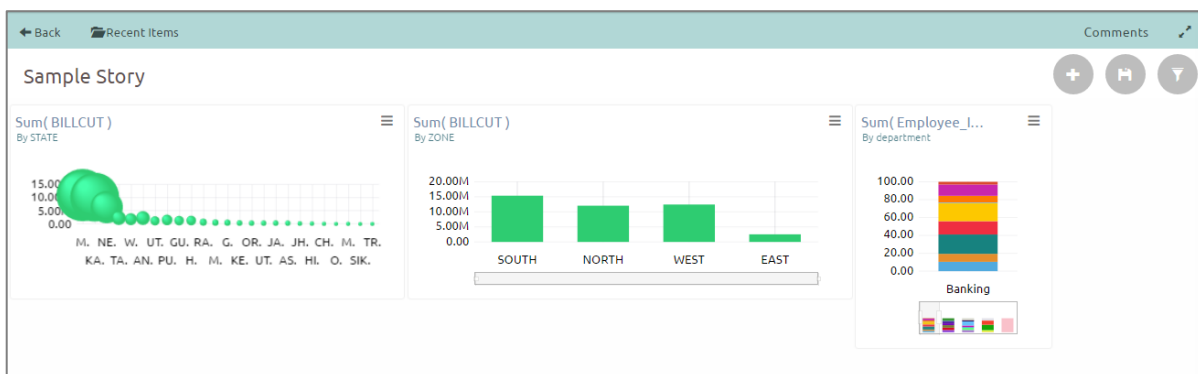
Note:

- a. View specific 'Chart properties' will be displayed on the right side of the page
- b. 'Measure Properties' can be displayed by clicking on the 'Series Properties' option

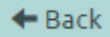
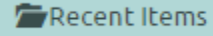
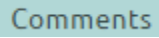
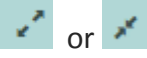





4.4. Story Board

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




4.4.1 Options

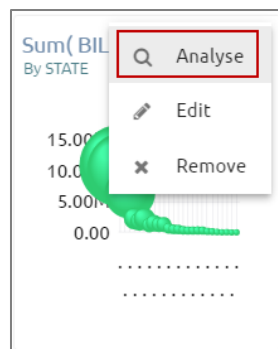
Icon	Name	Description
	Back	Directs back to the Story Document
	Recent Items	Displays the recently opened document/story by users
	Comments	Allows users to describe about the story
	Full Screen/ Reduce Size	Displays the Story Board in the full screen view or reduces the Story Board display screen
	Create New View	Redirects users to design a new view
	Save Story	Saves modified views on the Story Board
	Global Filter	Filters multiple views on a Story Board

4.4.2. Options Assigned to a View

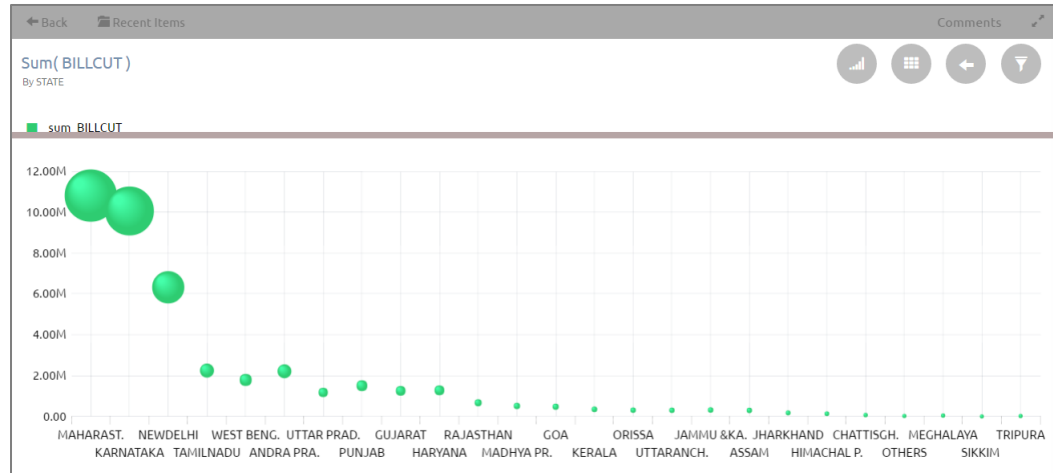
All the following options can be accessed from the Story Board.

1. Analyze

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



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

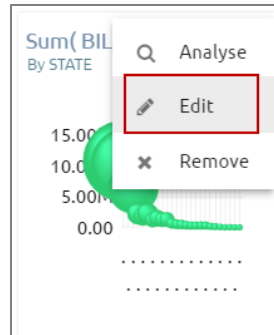


vi) Users can select any of the following option to analyze the view:

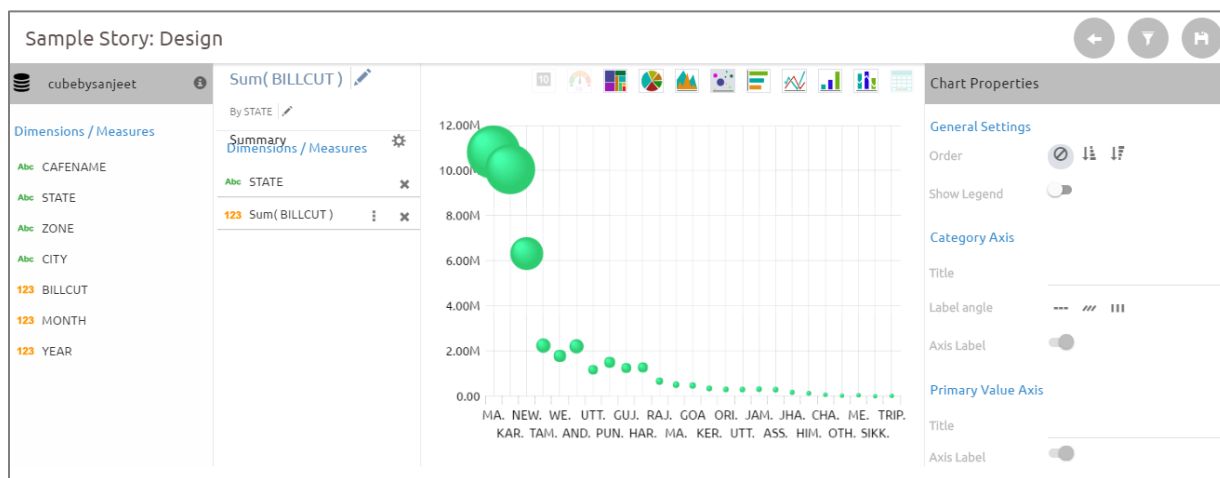
Option	Name	Description
	Chart	Displays data in a chart view
	Grid	Displays data in a grid view
	Back	Directs back to the Story Board
	View Filter	Displays filter panel to apply or edit view specific filter values

2. Edit

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




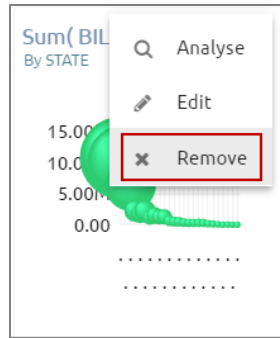
iv) Users will be directed to the designer page



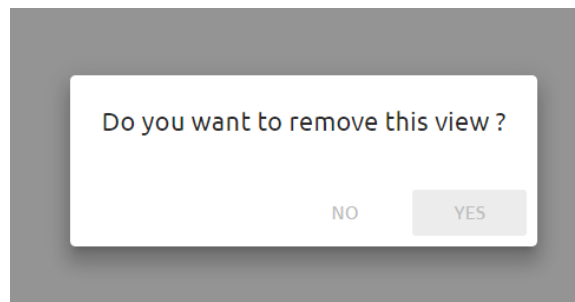
- v) Edit the required details
- vi) Click 'Save'
- vii) The modified view will be saved successfully on the Story Board

3. Remove

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



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




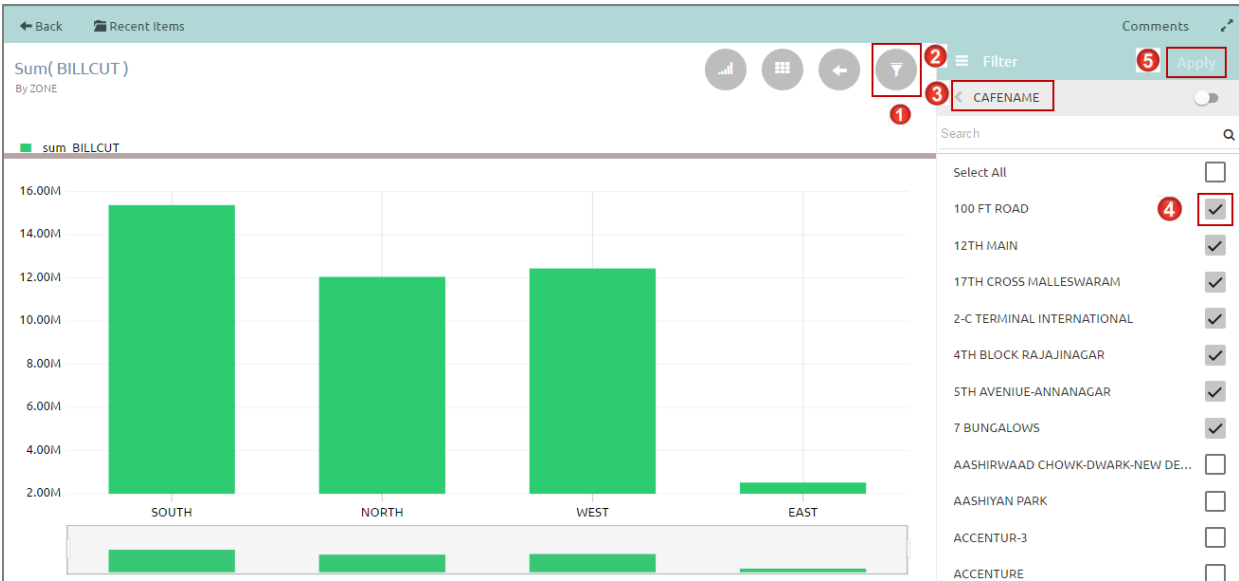
- vi) The selected view will be removed from the Story Board

4.5. Applying Filter

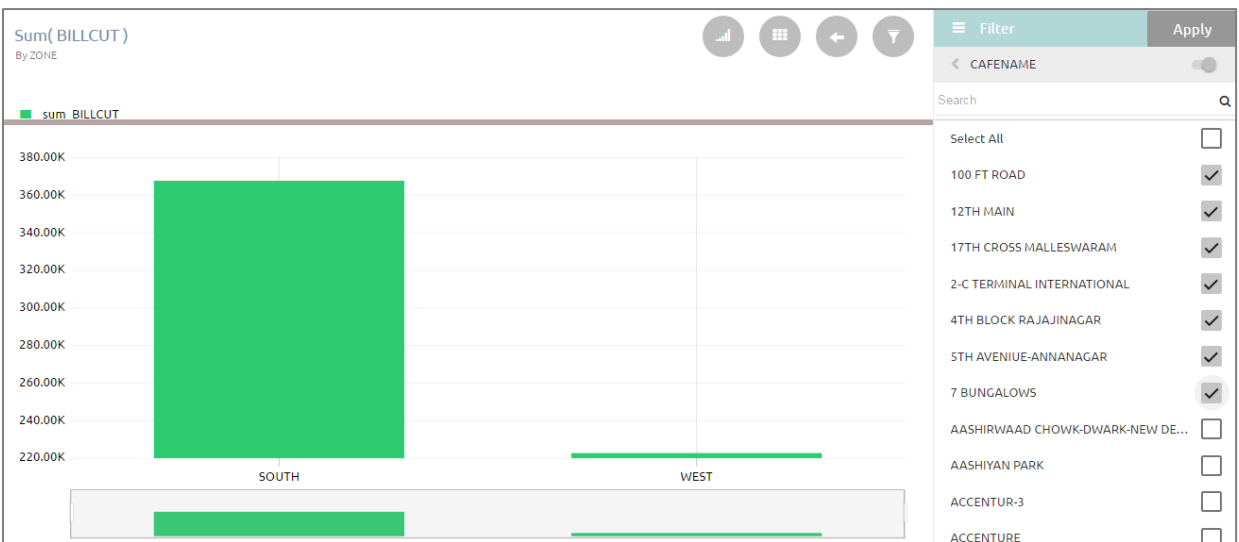
Users can apply filter to a view or the entire business story.

i) View Specific Filter

- a. Click 'Filter'  on the Story Designer
- b. A filter panel opens with the list of filter values
- c. Click on a filter value to display a list containing all the sub-filter values
- d. Select a sub-filter value by check marking the box
- e. Click 'Apply'



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




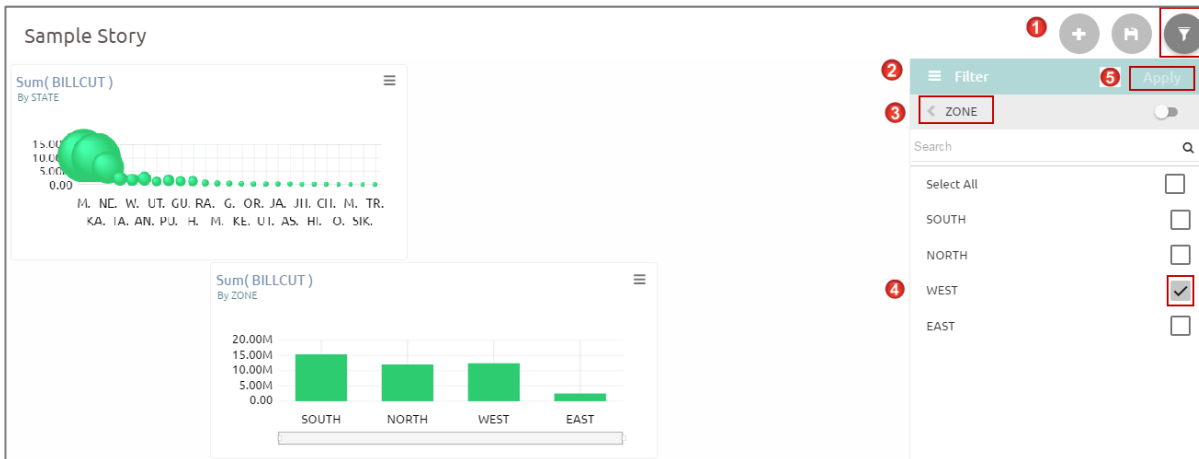
Note:

- a. Users need to click '**Apply**' button while enabling or eliminating the view specific filter values to reflect the same in the view.
- b. Users can insert, modify, or remove a view specific filter via '**Analyse**' option.



ii) Global Filter

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



- f. The global filter will be applied to all the concerned views on a Story Board



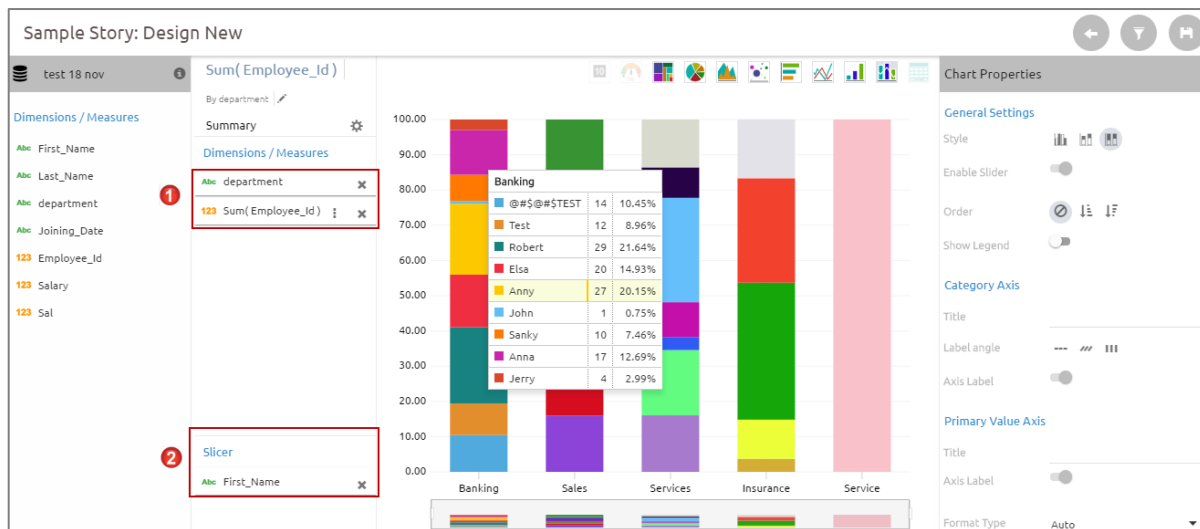
Note:

- a. Global filter can be applied only to those views where the filter values are used as dimensions.
- b. Global filter when applied to various views on a story board, subdues the view specific filter values.
- c. Users can insert views created via different data stores on one Story Board. By default, the Global filter panel will display all the obtainable filter values across the data stores.

4.6. Adding a Slicer

- i) Select a data store and click ‘**Create New**’
- ii) User will be redirected to the designer screen
- iii) Drag and drop required dimension and measure in the ‘**Dimensions/ Measures**’ column
- iv) Drag and drop another dimension in the ‘**Slicer**’ space
- v) It will display slices based on the second-dimension value via a column chart (by default)

E.g. the following image shows employees’ first names forming one ‘**Department**’ in a stack percentage chart view.

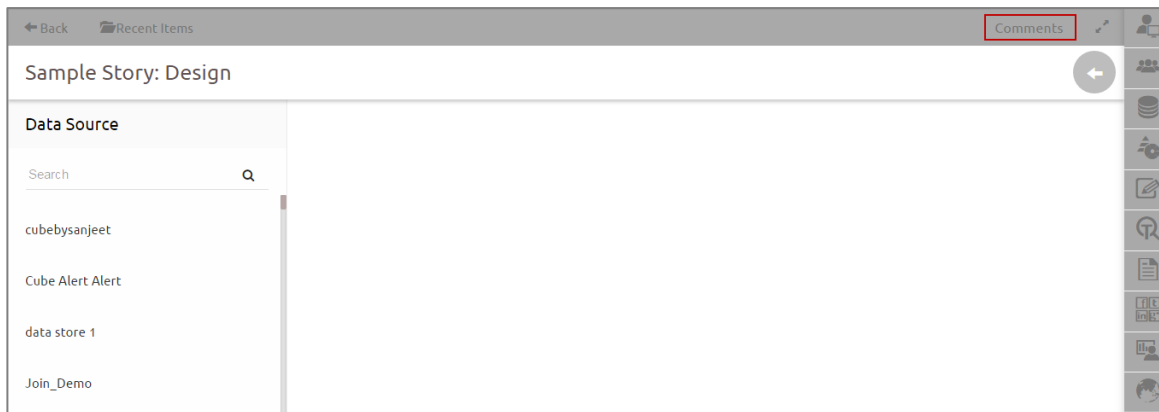



4.7. Comments

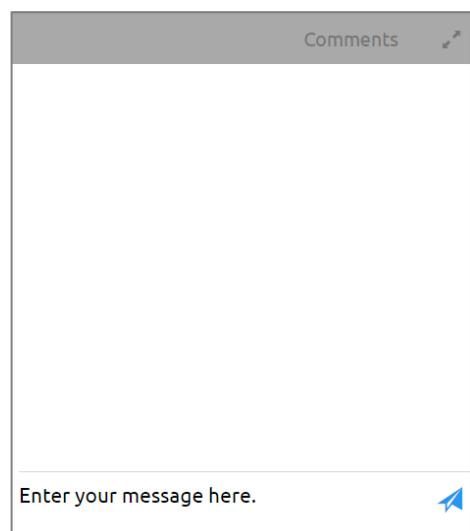
Users can access ‘**Comments**’ option on the menu row while designing a story.



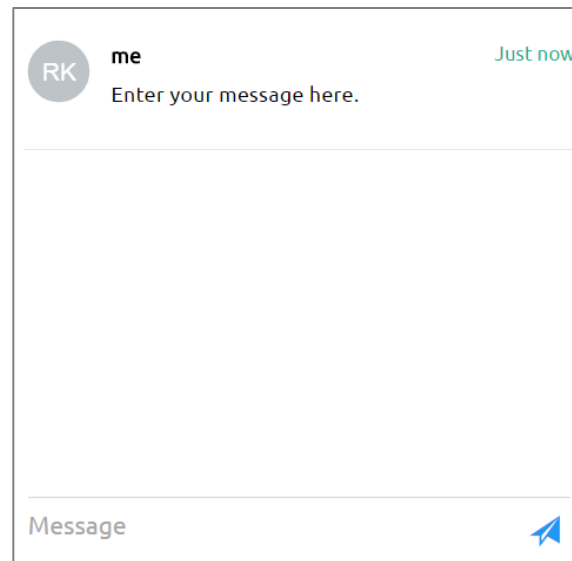
- i) Click '**Comments**'



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



- vi) The entered comment will be seen in the '**Comments**' window.


**Note:**

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

5. View Options

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

5.1. KPI Tile

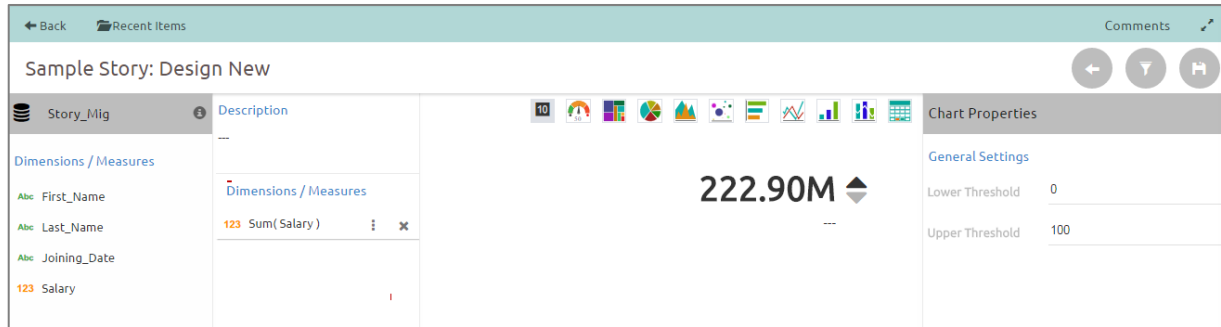
The KPI Tile will display the sum of the quantity with a value indicator 

Values to be selected:

- Dimension: None
- Measure: 1

Chart Properties:**i) General Settings:**

- a. Lower Threshold: Set a low value
- b. Upper Threshold: Set a high value



5.2. Semi Gauge Chart

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

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

Best Situation to use Semi-Gauge:

To monitor any performance that contains pre-defined ranges

Examples:

Overall performance of a student/class in an examination.

Chart Properties:

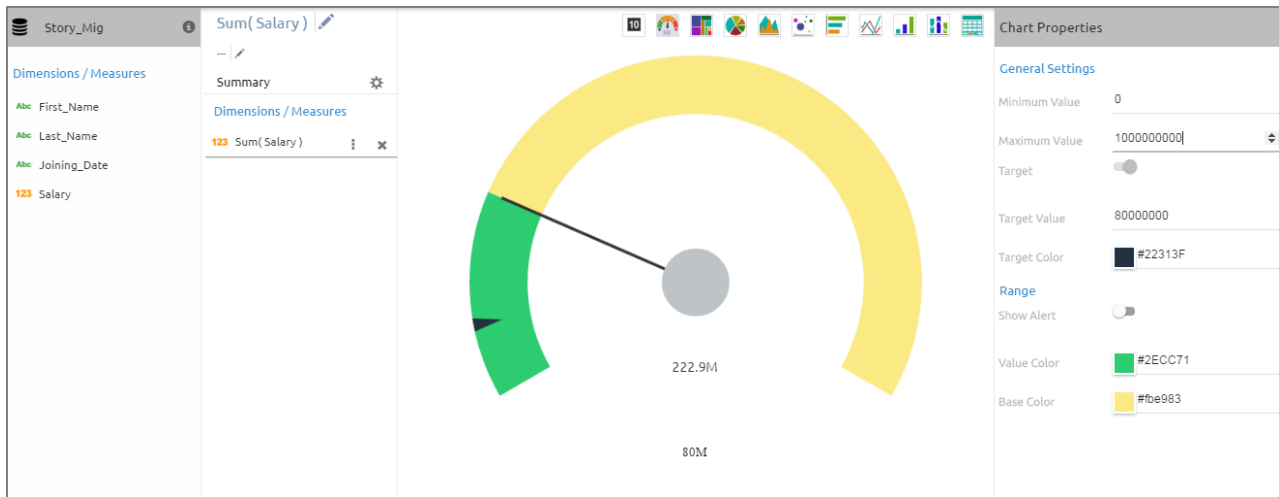
i) General Settings:

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

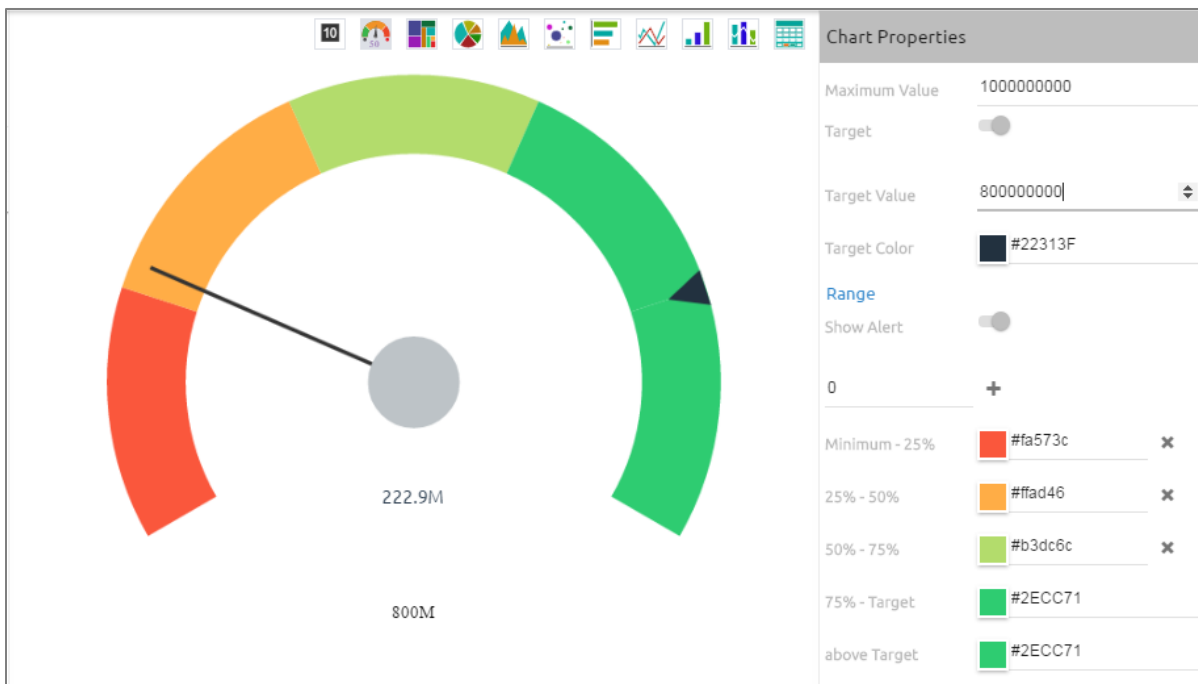
ii) Range:

- Show Alert: Enable various ranges (in %) by turning on the radio button

- b. Value Color: Set a value color
- c. Base Color: Set a base color



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



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

5.3. Tree Map Chart

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

Best situation to use Tree map:

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

Variations of this chart:

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

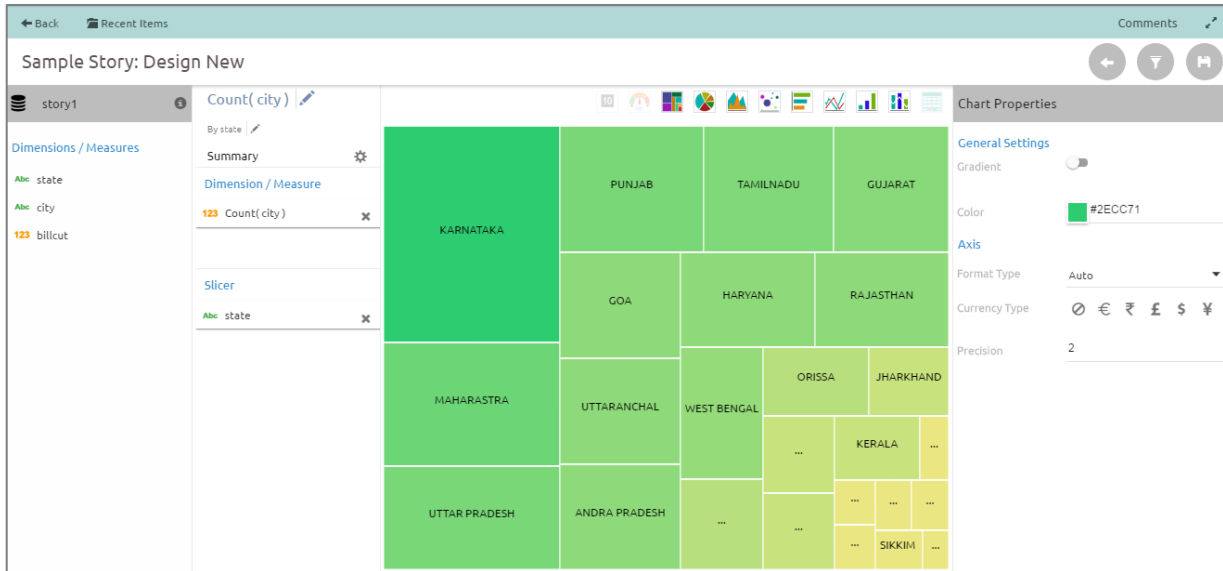
Chart Properties:

i) General Settings:

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

ii) Axis:

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



5.4. Pie Chart

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

Best situation to use Pie Chart:

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

Variations of this chart:

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

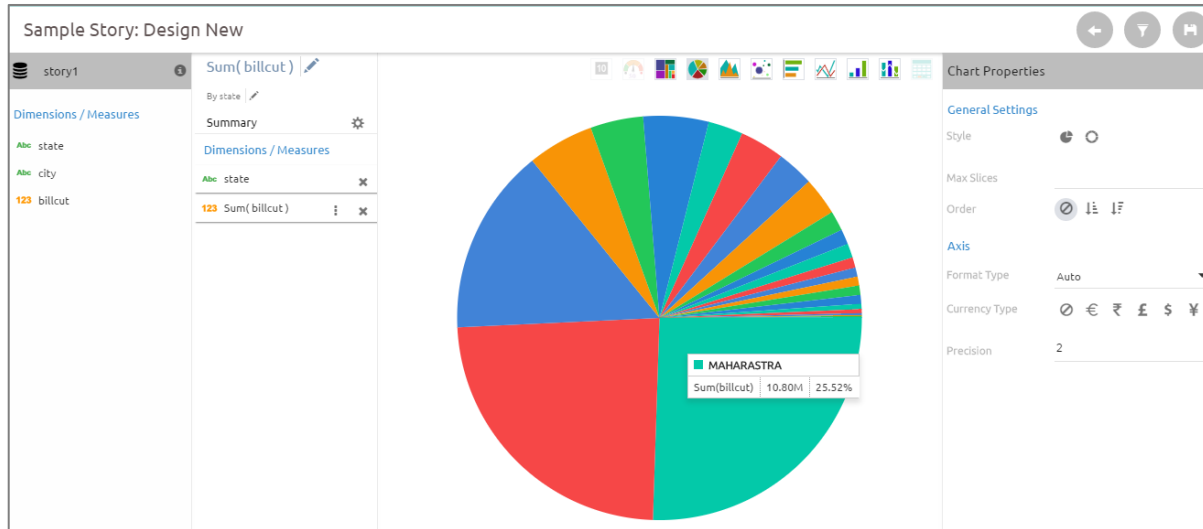
Chart Properties:

i) General Settings:

- a. Style: Select a style for the data display
- b. Max Slices: Set maximum number of slices to be displayed
- c. Order: Select an order to display data

ii) Axis:

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



5.5. Area Chart

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

Best situation to use Area Chart:

Examples:

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

Variations of this chart:

Line charts

Chart Properties:

i) General Settings:

- Order: Select an order to display data
- Show Legend: Enable legend by clicking in the check box

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

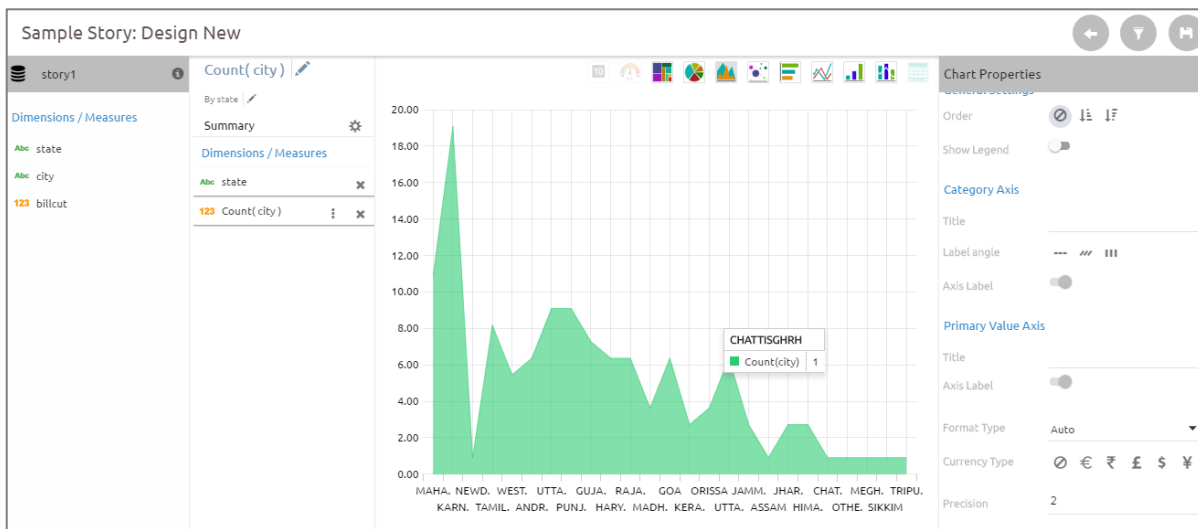
- Legend Style: Select one of the following option by using the drop-down menu
 - Fixed
 - Floating
- Legend Orientation: Select one of the following option by using the drop-down menu
 - Vertical
 - Horizontal

ii) **Category Axis:**

- a. Title: Enter an axis title
- b. Label Angle: Select a display angle for the label
- c. Axis Label: Enable the category axis labels by turning on the radio button

iii) **Primary Value Axis:**

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



5.6. **Bubble Chart**

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

Best situation to use a Bubble Chart:

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

Chart Properties:

i) General Settings:

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

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

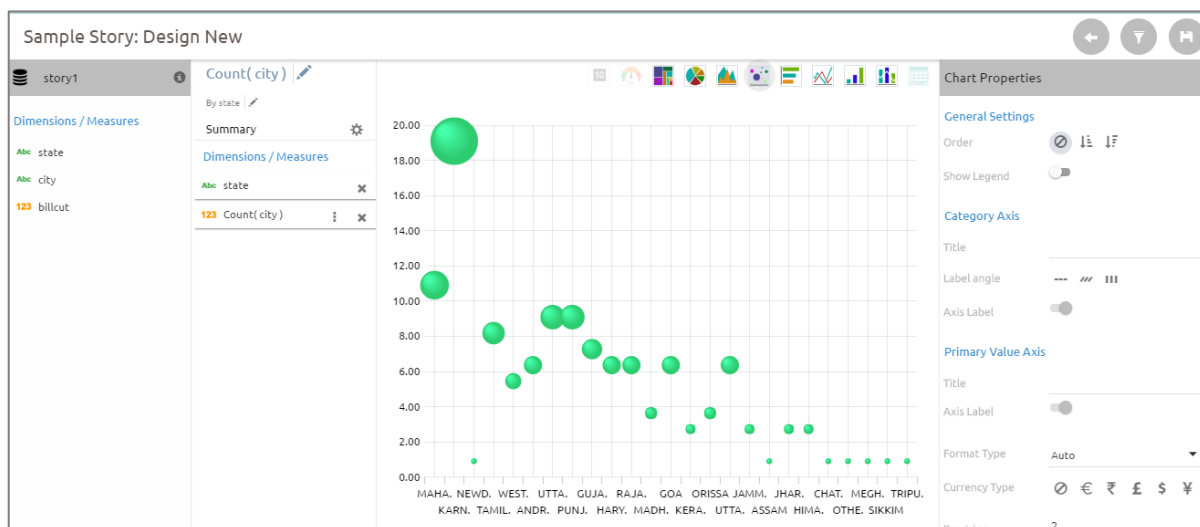
- i. Legend Style: Select one of the following option by using the drop-down menu
 - 3. Fixed
 - 4. Floating
- ii. Legend Orientation: Select one of the following option by using the drop-down menu
 - 1. Vertical
 - 2. Horizontal

ii) Category Axis:

- a. Title: Enter a title for the category axis
- b. Label Angle: Select a display angle for the label
- c. Axis Label: Enable category axis labels by turning on the radio button

iii) Primary Value Axis:

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





5.7. Bar Chart

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

Best situation to use bar chart:

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

Examples:

- a. Quarterly sales of an organization
- b. Percentage of change in sales or revenue can be indicated

Variations of this chart:

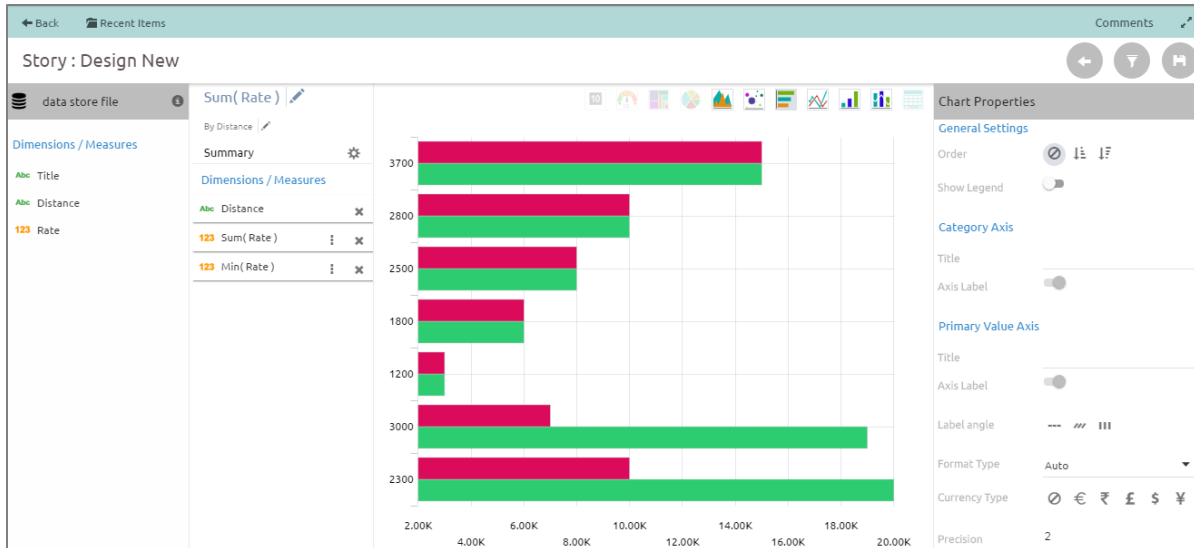
Add color for quick insight: Displaying the bars with colors will make users to pay quick attention to important tasks.

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

Chart Properties:

- i) **General Settings:**
 - a. Order: Select an order for the display of data
 - b. Show Legend: Enable legend by turning on the radio button
After enabling '**Show Legend**', users need to select the following information:
 - i. Legend Style: Select one of the following option by using the drop-down menu
 1. Fixed
 2. Floating
 - ii. Legend Orientation: Select one of the following option by using the drop-down menu
 1. Vertical
 2. Horizontal
- ii) **Category Axis:**
 - a. Title: Enter a title for the category axis
 - b. Axis Label: Enable the category axis labels by turning on the radio button
- iii) **Primary Value Axis:**
 - a. Title: Enter a title for the primary value axis
 - b. Axis Label: Enable the primary axis labels by turning on the radio button

- c. Label Angle: Select a display angle for the label
- d. Format Type: Select a format type from the drop-down menu
- e. Currency Type: Select a currency type from the displayed options
- f. Precision: Set the after-decimal value (It will display up to 5 precision)



5.8. Line Chart

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

Best Situation to use Line Charts:

View trends in data over a period

Examples:

To indicate increasing revenue or varying stock price

Variations of this chart

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

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

Chart Properties:



i) General Settings:

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

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

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

ii) Category Axis:

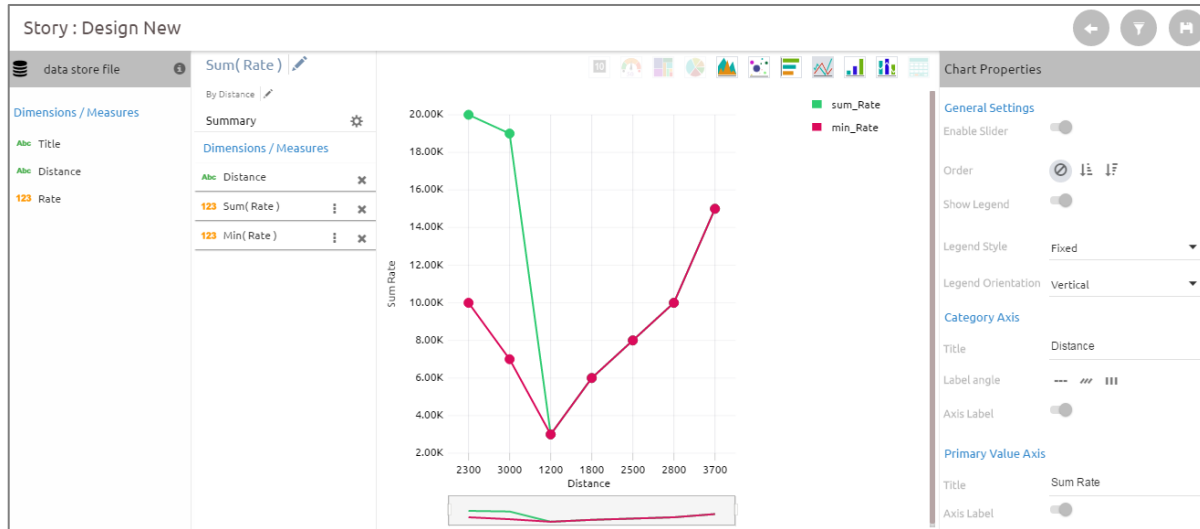
- a. Title: Enter a title for the category axis
- b. Label Angle: Select a display angle for the label
- c. Axis Label: Enable the category axis labels by turning on the radio button

iii) Primary Value Axis:

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

iv) Secondary Value Axis:

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



5.9. Column Chart

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

Best Situation to use Column charts:

Column charts are good for displaying data sets with negative values

Example:

To find the best and worst performers in an organization

Variations of this chart

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

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

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

Chart Properties:

i) General Settings:

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



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

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

ii) Category Axis:

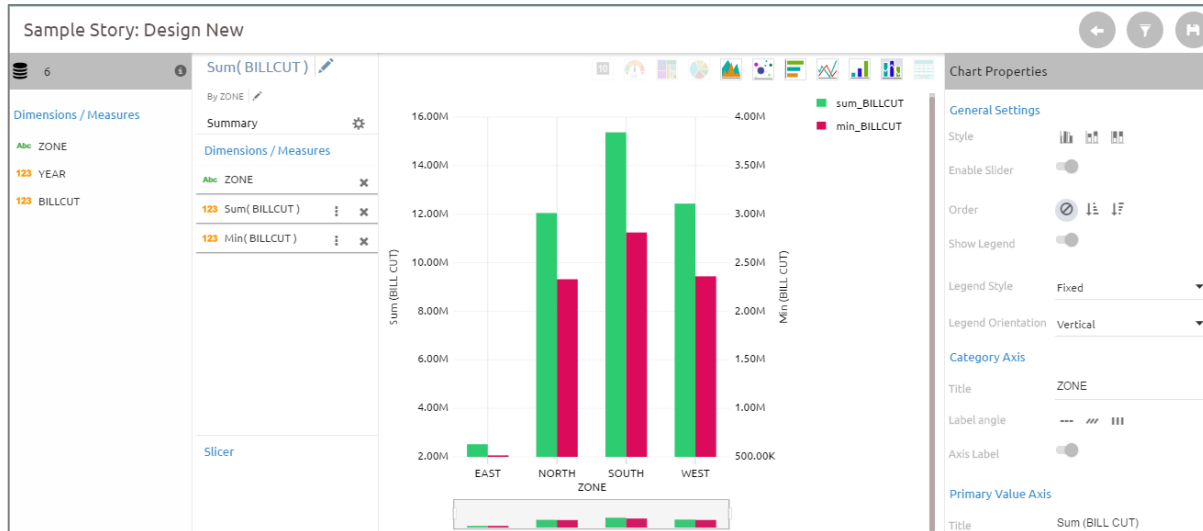
- a. Title: Provide a title for the axis
- b. Label Angle: Select a display angle for the label
- c. Axis Label: Enable the category axis label by turning on the radio button

iii) Primary Value Axis:

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

iv) Secondary Value Axis:

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



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

5.10. Mixed Chart

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

Best situation to use Mixed Chart:

To compare multiple categories

Example:

To analyze company's budget v/s revenue.

Variations of this chart:

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

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

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

**i) General Settings:**

- a. Style: Select a style for the data display
- b. Enable Slider: Enable slider by turning on the radio button
- c. Order: Select an order for displaying data
- d. Show Legend: Display legend by turning on the radio button
After enabling '**Show Legend**', users need to select the following information:
 - i. Legend Style: Select one of the following option by using the drop-down menu
 1. Fixed
 2. Floating
 - ii. Legend Orientation: Select one of the following option by using the drop-down menu
 1. Vertical
 2. Horizontal

ii) Category Axis:

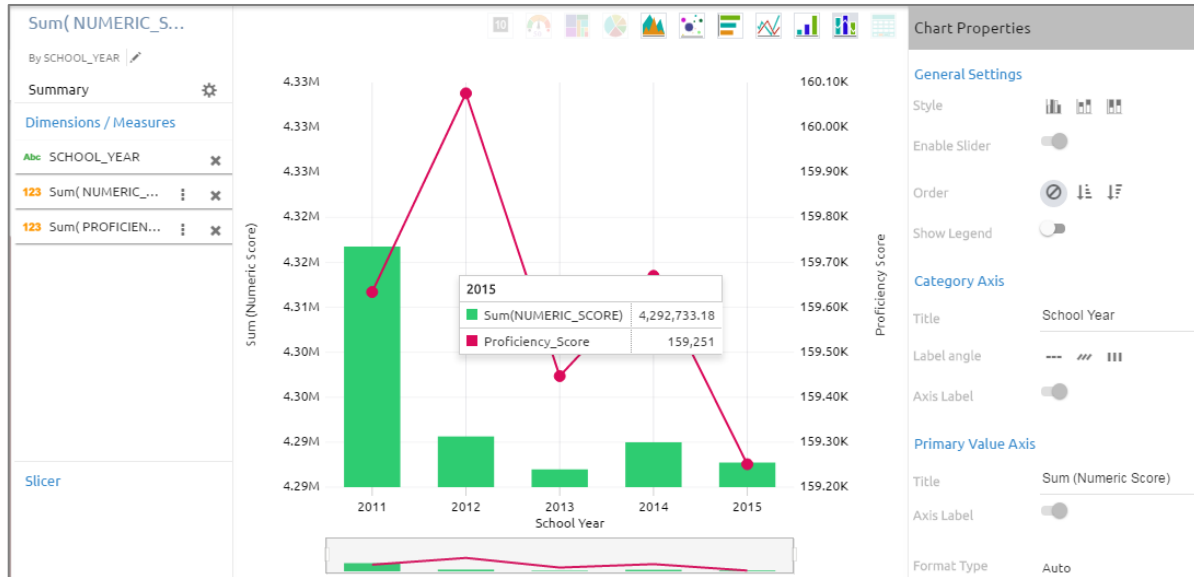
- a. Title: Provide a title for the axis
- b. Label Angle: Select a display angle for the label
- c. Axis Label: Enable the category axis label by turning on the radio button

iii) Primary Value Axis:

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

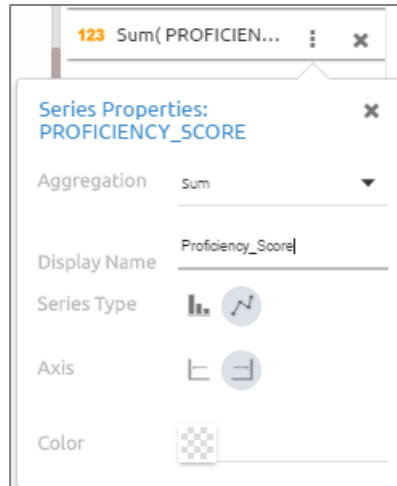
iv) Secondary Value Axis:

- a. Enable: Enable the secondary value axis label by turning on the radio button
- b. Title: Provide a title for the secondary value axis
- c. Format Type: Select a desired format type from the drop-down menu
- d. Currency Type: Select a desired currency symbol from the list
- e. Precision: Set the after-decimal value (It will display up to 5 precision)



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

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



5.11. Data Grid


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

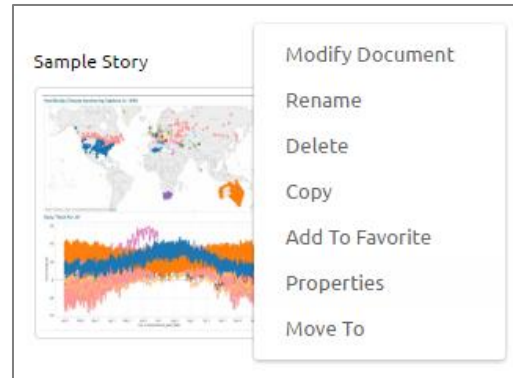
Measure	Total
sum(STUDENT_AGE_YEARS)	3417168
sum(NUMERIC_SCORE)	21.50M

- i) **Measure Description:** Provide a title for the Measure Column
- ii) **Summary Description:** Provide a title for the Summary Column


6. Options

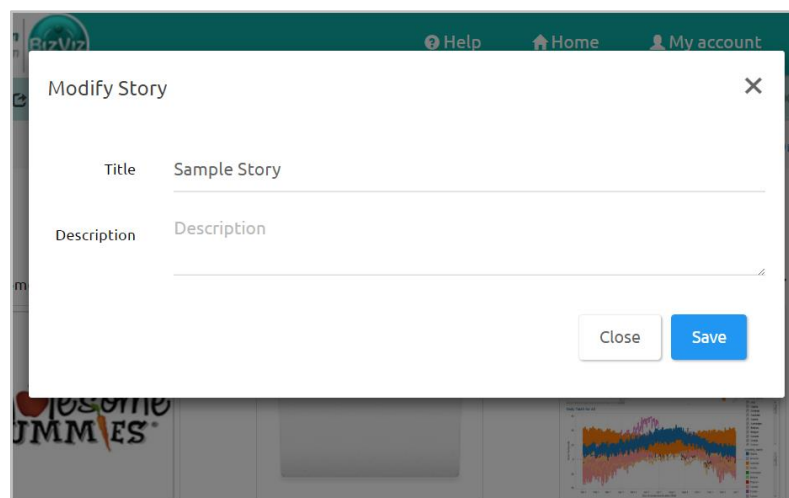
A story created under ‘**My Documents**’ or ‘**Public Documents**’ is credited with various options. This section describes all the options assigned to a Business Story document.

- i) Navigate to ‘**My Documents**’ or ‘**Public Documents**’
- ii) Select a story document
- iii) Click the ‘**Settings**’ icon 
- iv) A context menu opens with various options




6.1. Modifying a Document

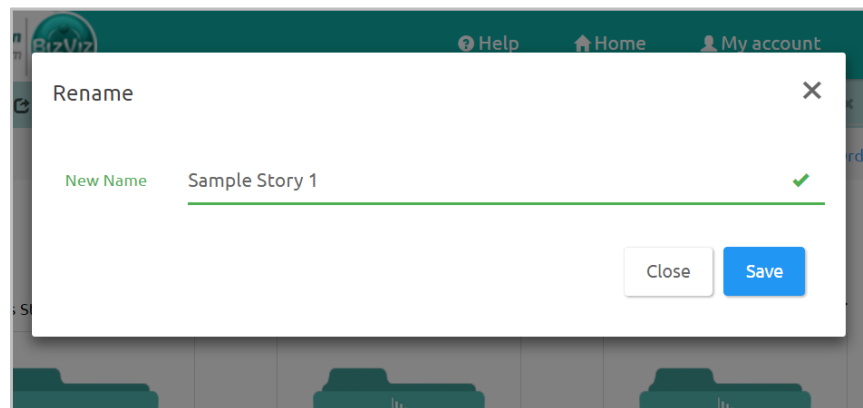
- i) Select a story document
- ii) Click '**Settings**'  for options
- iii) Select '**Modify Document**'
- iv) A new window will pop-up
- v) Modify the following information:
 - a. Title:
 - b. Description:
- vi) Click '**Save**'



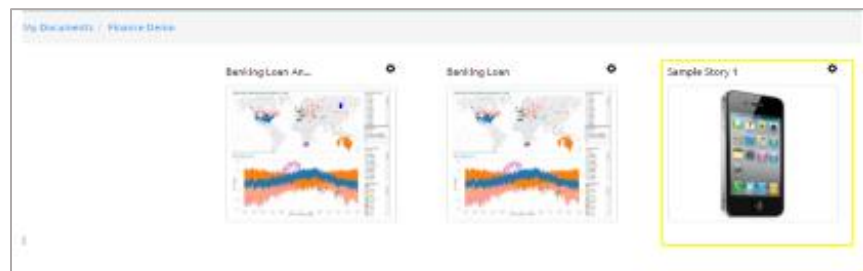
- vii) The information will be modified

6.2. Renaming a Story Document


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

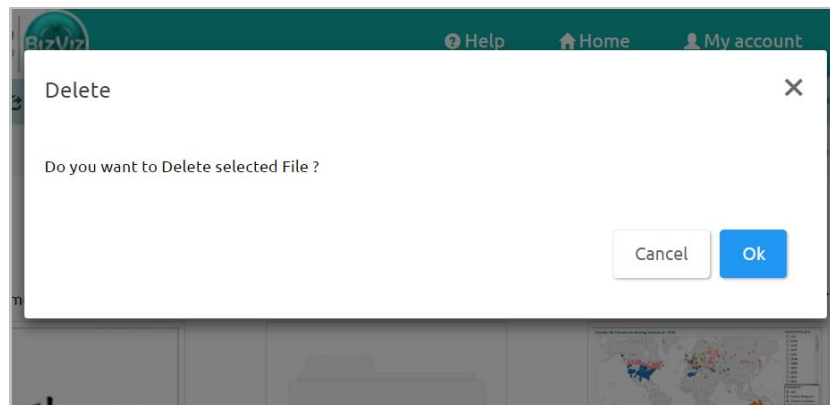


- vii) The story document name will be changed successfully



6.3. Deleting a Business Story

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



vi) The selected story document will be removed

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


6.4. Copying and Moving a Business Story

It is possible to copy a business story document and paste it to the selected place from the BizViz Platform.

i) Select a story document

Click 'Settings'  for options

ii) Select 'Copy'

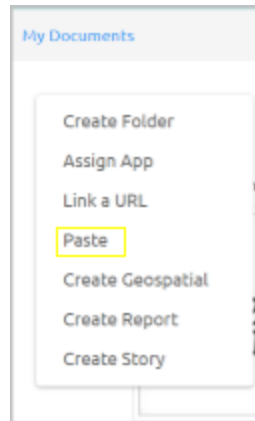
iii) Select another folder and click the 'Settings' icon 

Or

Navigate to 'My Documents' or 'Public Documents' and right click anywhere

iv) A context menu will appear with the 'Paste' option

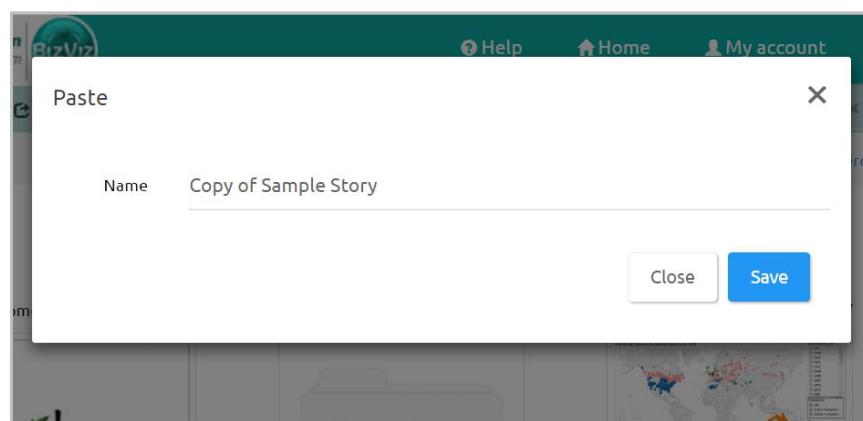
v) Select 'Paste'



vi) A new window pops-up

vii) The **Name** mentioned in the pop-up window shows prefix '**Copy of-**' before the original name of the story document (E.g. *Sample Story* will have a new name *Copy of Sample Story*)

viii) Click '**Save**'




ix) A message pops-up to assure that the copied story document has been pasted successfully with a different name

E.g. the following image shows that *Sample Story* is named *Copy of Sample Story* and has been copied to '**My Documents**'




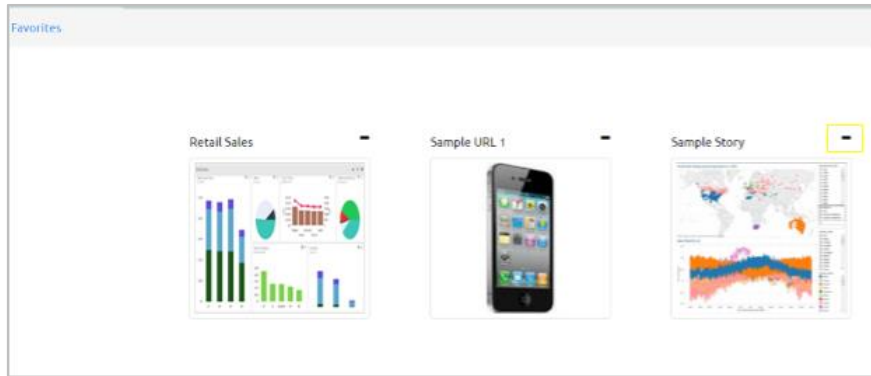
6.5. Adding/Removing a Story Document to/from Favorites

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

- i) Select a story document
- ii) Click '**Settings**'  for options
- iii) Select '**Add to Favorite**'
- iv) A new window pops-up with a message, "**Document added to Favorites**"
- v) The selected story document will be added to '**Favorites**'




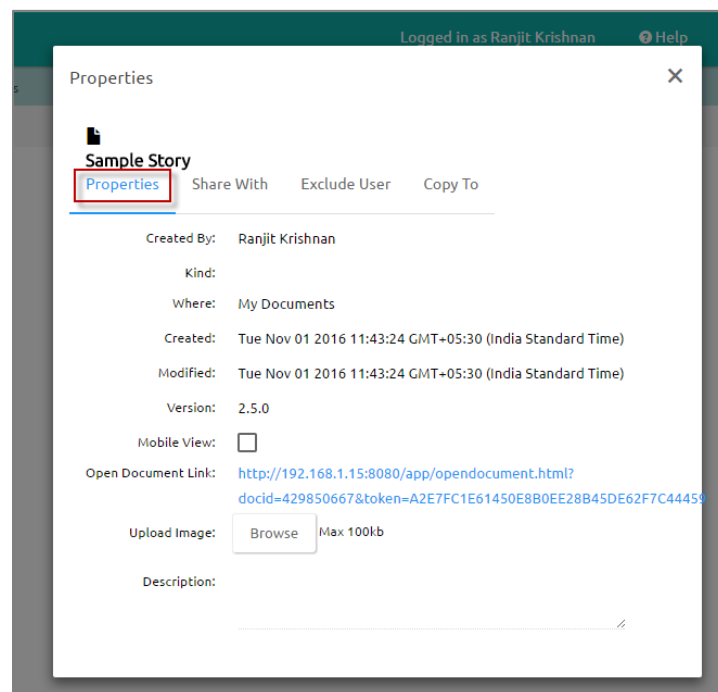
- vi) Open '**Favorites**'
- vii) Navigate to the story document you wish to remove from '**Favorites**'
- viii) Click the '**Remove**' button 



- ix) A new window pops-up with a message, **“Document removed successfully!”**
- x) The selected story document will be removed from **‘Favorites’**

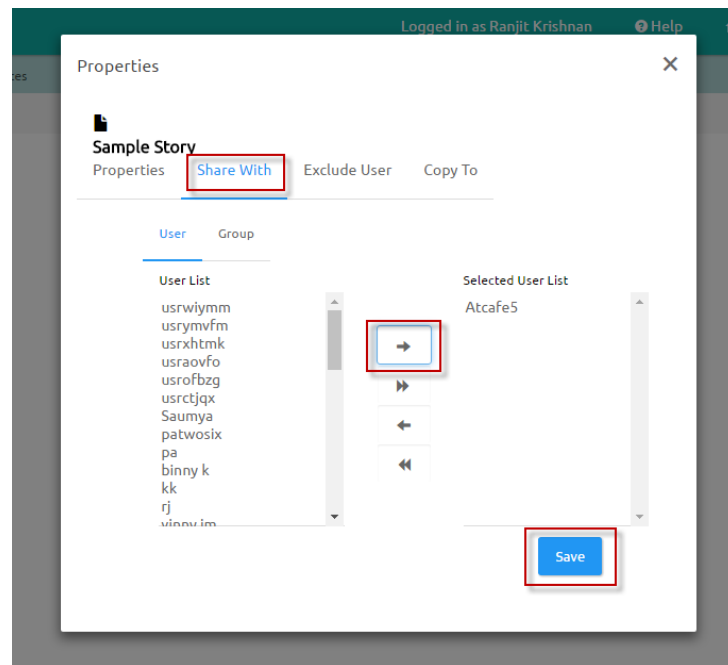
6.6. Properties

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



b. Share With: The story document will be shared with the selected user or user group.

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

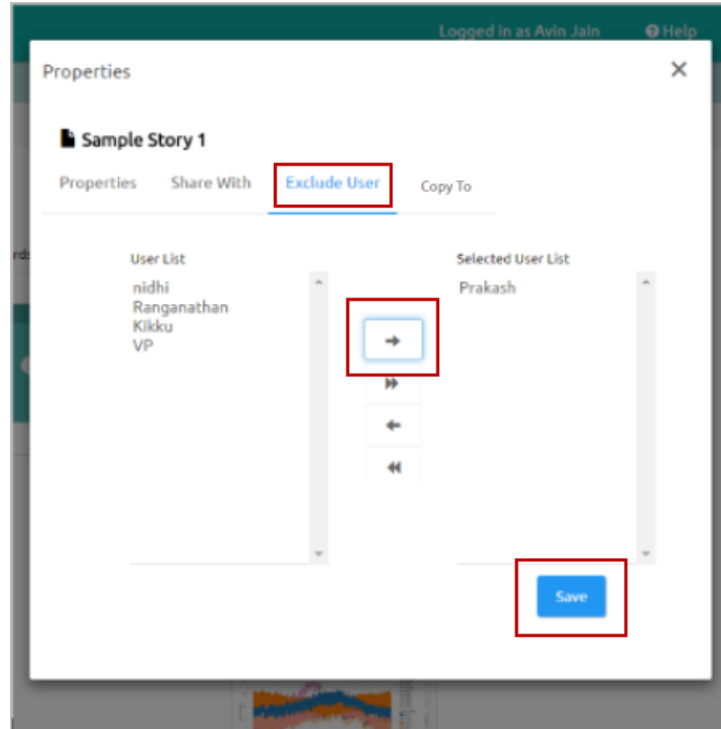


5. The story document will be shared with the selected user or selected user group

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

c. Exclude User: The selected user will not be able to access the story document.

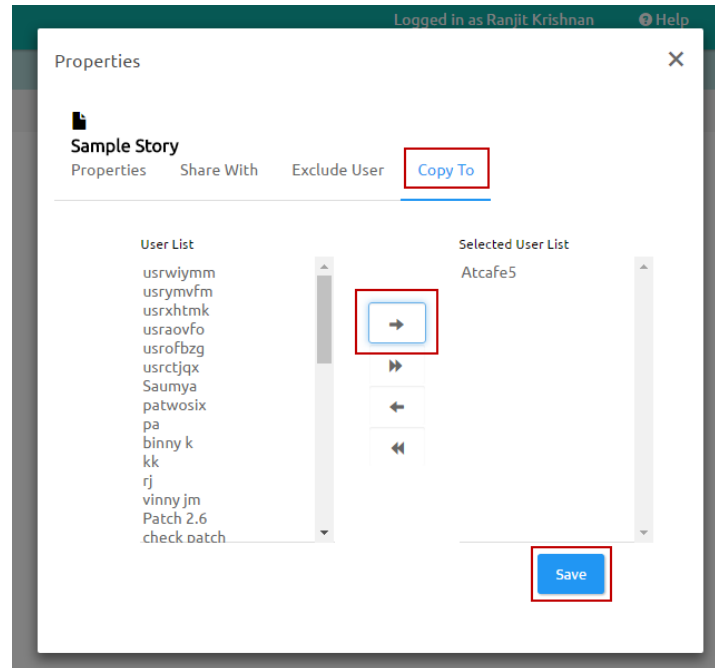
1. Select '**Exclude User**' on the Properties pop-up screen
2. Select and move users from '**User List**' to '**Selected User List**' using the arrows
3. Click '**Save**'



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

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



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

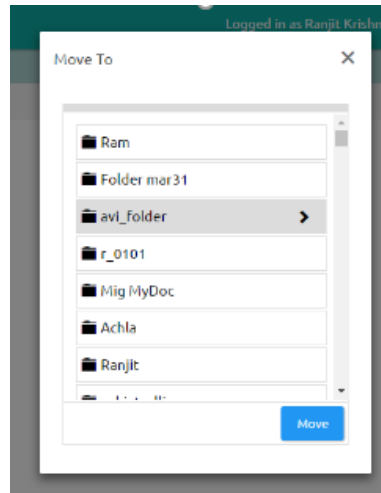


4. A copy of the story document will be shared to the selected user

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

6.7. Move To

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



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

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

7. Logging Out

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

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

Note:

- a. Clicking on '**Logout**' will redirect the user back to the '**LOGIN**' page of the BizViz platform.
- b. It is not mandatory to close a business story to Log Out from it. However, the user can click the '**Back**' option from the left side of the menu row on the Business Story screen to close a Business Story.