



BDB 8.2 All Business Story Quick Tutorial Workflows

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BDB 8.2: All Business Story Workflow – 1

Workflow 1 provides users of the BDB Platform with a clear process for creating a Business Story. This involves uploading a CSV file in the Data Sandbox.

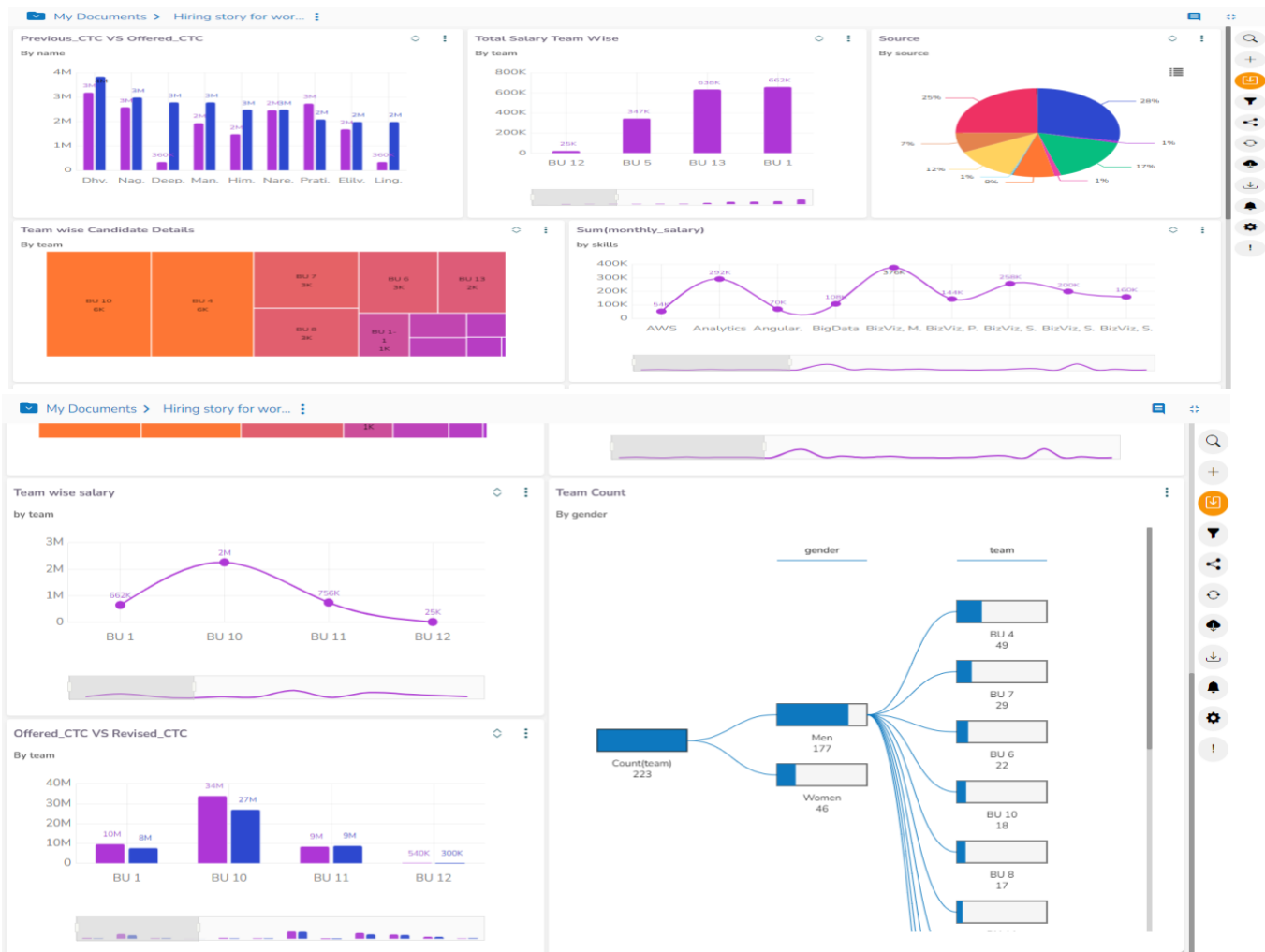
Creating a BI Story by uploading CSV file in Data Sandbox

The Data Center plug-in is utilized to upload a CSV file in the Data Sandbox. Through this upload, we can perform data preparation steps, leading to the creation of a Datastore. Finally, we can use the created Datastore to generate a BI Story.

1. Download the "HiringData" dataset as the first step.
2. Upload the downloaded file to the Data Sandbox.
3. Perform data preparation steps on the uploaded file and name the preparation as "Hiring_Data_Preparation."
4. In the preparation, substitute "Male" with "Men" and "Female" with "Women" in the gender column.
5. Fill the value 360,000 in the Previous_CTC column.
6. Delete any empty rows in the Previous_CTC, Offered_CTC, Monthly_Salary, and Expected_CTC columns to ensure data cleanliness.
7. Review the transformations and save the changes by clicking "Back."
8. Create a data store in the Data Sandbox menu, providing a name and selecting the previously performed data preparation.
9. Access the Datastore page to view the created data store and click "Edit" to access Dimensions and Measures.
10. Proceed to the next step by clicking "Finish" in the Datastore page.
11. Move on to the story module and give your Business story a name, selecting the created data store. Click "Create Story."
12. Customize charts by selecting from the menu, defining Dimensions and Measures, and accessing properties for further customization.

13. Order data by columns, limit records, change names, and save views. Saved views will be added to the story board.
14. Add synonyms to the data store by navigating to the Datastore page and clicking "Add Synonym." For example, specify "Gender" and "Monthly salary" as "gender" "Salary" and "Monthly."
15. Save the synonyms.
16. Use NLP Search and input "team salary" to display team-wise salary information. Choose the chart and save the view to the story board. Edit the view if needed.
17. Use a dissolution chart to count men and women team-wise. Drag and drop relevant Dimensions and Measures, customize the chart, and save it to the story board for visualization.
18. Utilize the Calculated Field section to add a user-defined formula. For instance, add the "Revised CTC" measure by navigating to the Calculated Field section, writing the desired formula, and saving it.
Revised Salary = 1.5*[previous_ctc]

If you wish to add more charts, you can repeat the process by selecting a different chart from the menu, defining Dimensions and Measures, customizing the chart, and saving your view to the story board



BDB 8.2: All Business Story Workflow – 2

Workflow 2 enables you to create a Business Story using the ClickHouse Database.

Creating a BI Story using Clickhouse Database

In the Data Center module, a Clickhouse Data Connector is created with the user's credentials. After that, a Datastore is created using the previously created Data Connector. Finally, a business story is created utilizing this Datastore.

1. Click on the "Apps" menu and navigate to the "Data Center" page.
2. Select "Data Connectors" from the options.

3. Click on "New" to create a new data connector.
4. Choose "ClickHouse" as the data connector type.
5. Name the data connector as "Workflow 2" and provide a description.
6. Enter your username and password.
7. Set the host ID as "Clickhouse.Clickhouse" and the port number as 9000. For the HTTP port, use 8123.
8. Select your SSL type and click "Save". A confirmation message will appear, indicating that the data connector has been successfully created.

Credentials:

Host: Clickhouse.Clickhouse

Port: 9000

HTTP Port : 8123

Username: arun

Password: arun123

dbname: db_arun

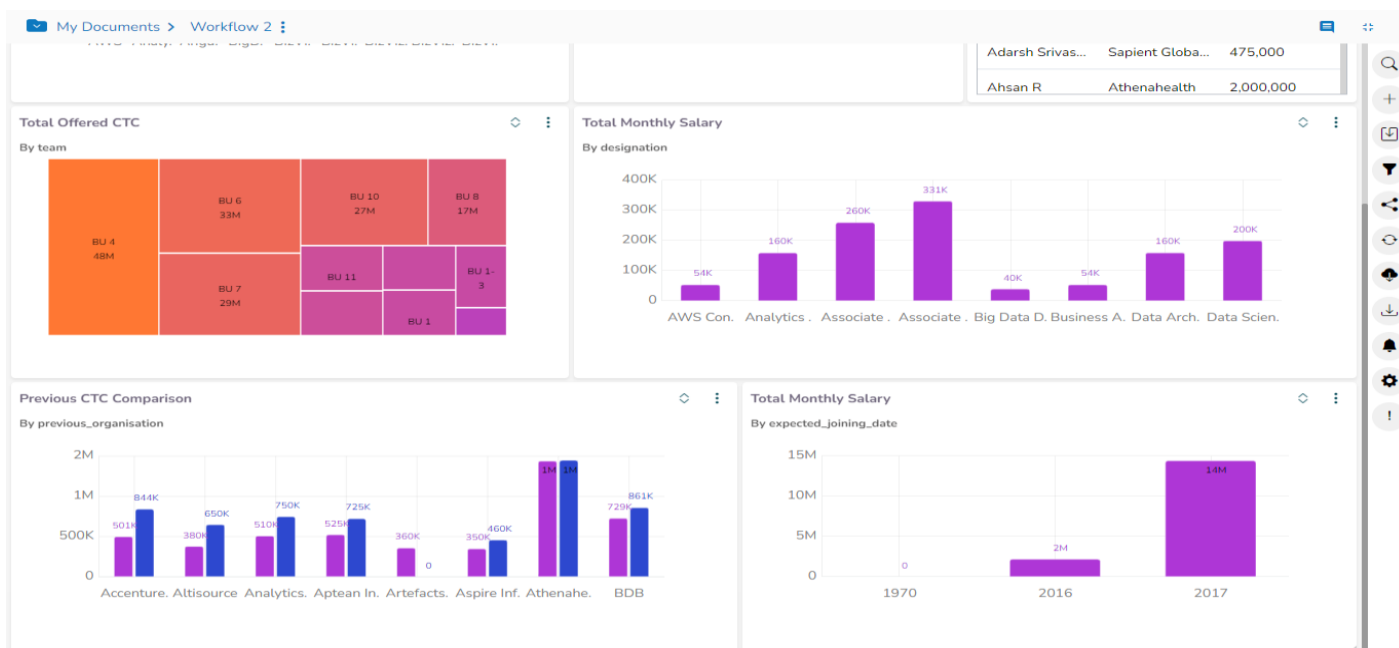
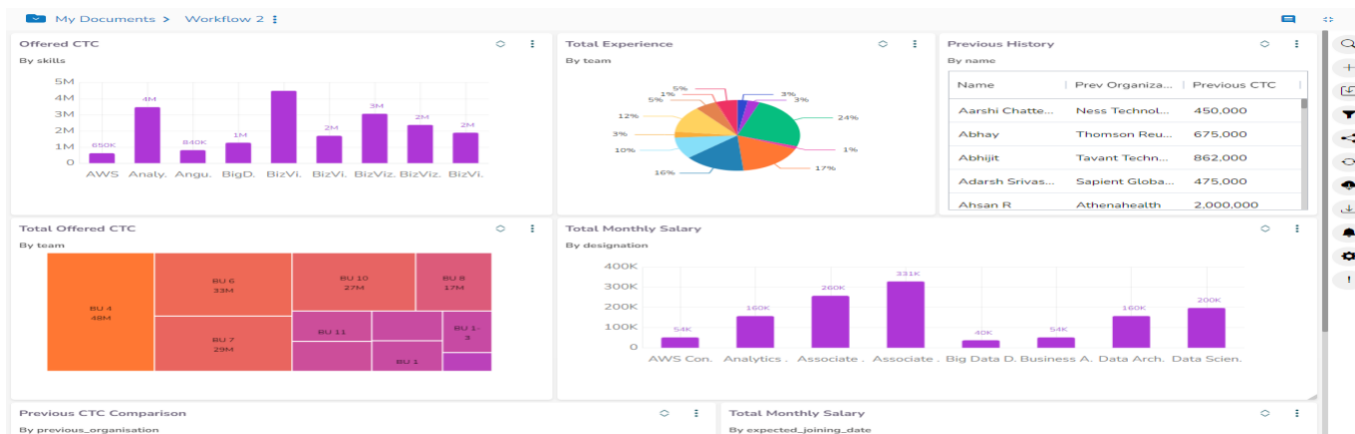
9. Create a Datastore using the created Data Connector. Click the "+" button and choose "Create New Data Store".
10. Name the Datastore as "workflow2".
11. Write the SQL Query to create the Datastore from the database and click "Next".
12. Configure the Dimensions and Measures. Set the "Expected Joining Date" as the Time Field and the "Expected CTC" as a Measure. Click "Next".
13. Define the Hierarchy and add "Expected Joining Date" in the Drill definition. Additionally, add "source", "skills", "team", and "Designation" in Drill definition 1. Click "Next" and then "Finish".
14. The created Datastore will be visible.

15. Access the Story Module. Name your story, such as "Workflow 2", and provide a description.
16. Select the previously created Datastore and click on "Create Story".
17. To visualize the Total Offered CTC by skill, choose a mixed chart and drag the dimensions (e.g., Skill) and Offered CTC measure onto the chart. Customize properties like sorting, order by, bar size, and display name. Change the view name and save the view.
18. To visualize team-wise total experience, choose a pie chart and drag the relevant dimensions (e.g., Team) and measures (e.g., Experience) onto the chart. Customize properties such as ascending order and order by team. Change the display name and the view name. Save the view.
19. Use a data grid to visualize the previous history of all employees. Select the data grid from the chart menu and drag the dimensions (e.g., Name, Previous Organization) and measures (e.g., Previous CTC) onto the chart. Customize properties like ascending order for the name and display names for columns. Change the view name and save it.
20. Use a tree map chart to visualize Team-wise Offered CTC. Choose the tree map chart and drag the relevant dimensions (e.g., Team) and measures (e.g., Offered CTC) onto the chart. Customize properties such as the order by team in ascending order. Change the display name and the view name. Save the view.
21. Use a mixed chart to visualize the monthly salary by designation. Drag the dimensions (e.g., Designation) and measures (e.g., Monthly Salary) onto the chart. Customize properties like ascending order for the designation, limit records, and bar size. Change the display name and the view name. Save the view.
22. Visualize the average of Previous CTC with Offered CTC using a mixed chart. Drag the dimensions (e.g., Previous Organization) and measures (e.g., Previous CTC, Offered CTC) onto the chart. Customize properties for sorting and order by the previous organization, limit records, and bar size. Change the display name and the view name. Save the view.
23. Set a timeline play for the view. Click "Analyse" and select "Timeline Play" from the right pane. Modify the time dimensions, set the interval as a month, specify the start and end dates, and set a delay. Start the timeline play to observe the charts automatically changing on a monthly basis.
24. Set an interaction for the view. Click "Edit" and then click "Interaction" on the right pane. Enable interactions and choose the chart to set interactions on. Save the view. Clicking on any skills will reflect changes in the "Total Offered CTC by Team" chart.

25. Use the drill-through option to visualize the monthly salary by joining date. Drag the dimensions (e.g., Monthly Salary, Expected Joining date) and measures onto the chart. Customize properties as desired, including ordering by ascending joining date. Change the display name and the view name. Save the view.

26. Double-tap on the view and click on the bar. Choose "Drill Through" from the options. All the months will be visible. Click on a specific month to see the corresponding dates.

By following these steps, you will be able to create a Business Story using Data Connectors and Data stores.



BDB 8.2: All Business Story Workflow – 3

Workflow 3 enables you to build Business Story from Data store Metadata using Pipeline.

Creating a BI Story from Datastore MetaData

The initial step is to upload a CSV file into the Sandbox and perform data preparation steps. Afterward, a pipeline is configured using Environment Variable credentials to generate Datastore metadata. Finally, the Datastore metadata is utilized to create a story in the documentation.

1. Go to the Data Center page and navigate to the Data Sandbox. Click on "New".
2. Select "Data Sandbox" from the list and name the workflow as "Workflow 3". Upload the file.
3. Choose the data preparation icon and name the preparation as "Data Preparation 3". Perform the necessary data preparation steps.
4. Replace "Male" with "Men" and "Female" with "Women". Additionally, replace the value "0" with "375,000" in the "Previous_CTC" column.
5. Delete rows with empty cells for "Offered CTC", "Expected CTC", and "Monthly Salary".
6. Review the transformations made, click "Back", and save the preparation.
7. Go to the Data Pipeline module.
8. Click the "+" button and choose "Create Pipeline".
9. Name the pipeline as "Workflow 3" and allocate appropriate resources. Click "Save".
10. You will be directed to the Pipeline Editor.
11. Search for the "Component Sandbox Reader" and drag it onto the editor.
12. Set the Invocation type as "Realtime". In the Meta Information section, select the storage type as network, file type as CSV, and choose the sandbox name and file.
13. Enable the header and schema inference options. Save the component.
14. Configure the event panel, add an event, and modify its properties.
15. Connect the event with the component.
16. Add the "Data Preparation" component, configure it, and connect it to the event.

17. Add the "SQL Component" to the editor, configure it with the necessary query, and connect it to the event.

(Query: *Select candidate_id,gender,`source`,designation,team,previous_organisation,skills,to_date(expected_joining_date,'dd/MM/yy')expected_joining_date,joining_status,current_status,experience,previous_ctc,offered_ctc,monthly_salary from df*)

18. Drag and drop the "DB Writer" component onto the editor, configure it with Clickhouse credentials, and establish a connection with the event.

Credentials:

DS_CH_HOST – Host ID

DS_CH_HTTP_PORT – HTTP Port

DS_CH_TCP_PORT – TCP Port

DS_CH_USER_DEVELOPMENT – Username

DS_CH_PWD_DEVELOPMENT – Password

DS_CH_DB_DEVELOPMENT – DB Name

19. Update the pipeline configuration and double-check for any issues.

20. Start the pipeline and verify its status and logs.

21. Preview the pipeline flow to ensure correct data processing.

22. Once the pipeline successfully runs, navigate to the Data Center page.

23. Select "Data Store Metadata" and click "New" to create a new Data Store Metadata.

24. Name the Data Store as "Workflow 3" and choose the table name created in the pipeline. Proceed to the next step.

25. Move the "Expected Joining Date" to the "Time" section and "Experience" to the "Measure" section. Click "Next".

26. Define the hierarchy by dragging "Expected Joining Date" to "Drill Definition 1" and other dimensions to "Drill Definition 2". Click "Next" and then "Finish".
27. The created Data Store Metadata will be visible.
28. Access the Story section.
29. Name your story, e.g., "Workflow 3", and select the previously created Data Store Metadata.
30. Click "Create Story" to proceed.
31. In the story, you will see dimensions and measures on the left and various charts on the right.
32. Choose the Mixed chart and drag dimensions and measures like "Previous Organization", "Previous CTC", and "Offered CTC" onto the chart.
33. Customize the chart properties such as ordering, record limit, bar size, and display names.
34. Change the display name for measures to "Average Previous CTC" and "Average Offered CTC" and for the dimension to "Previous Organization".
35. Save the view as "Previous History".
36. Create additional views using different chart types, dimensions, and measures. Customize properties and save the views accordingly.
37. Edit the first view, enable interactions, and select the "Offered CTC by Skills" view for interactions. Save the view.
38. Edit the "Monthly Salary by Skills" view, enable interactions, and select the "Monthly Salary by Designation" view. Save the view.

By following these steps, you can create a business story using Data Store metadata and the data pipeline. Utilize the interaction options to enhance the story



THANK YOU

For More Information,
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