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Visualization

Dashboard

- A Dashboard provides data visualization and provide meaningful information in visual formats i.e. chart, graphs, maps and many more. You can create a dashboard using the different widget and a single dashboard can have any number of widgets including tables, charts, maps, analytic, tabs etc.

- A Dashboard can be easily created using drag and drop GUI so you can see the whole story from a central location right from your Desktop, Mobile, and Tablet.

- The Dashboard contains the following items:

    - Create a Dashboard
    - Dashboard Preview & Edit
    - Dashboard Widgets
    - Dashboard Filters & Tabs
    - Configure Dashboard
    - Dashboard Grid view Options

Create Dashboard

- Only users with Dashboard privilege have access to this section.
- To Create a new Dashboard follow the steps below:

1. Select Visualization from the main menu bar and go to ⊕ Dashboard
2. Select ⊕, box will appear as follows:

Create	❓ ✖
☐ Dashboard Link	
Name	
Create File	Cancel

3. Provide the dashboard name and click on Create File button.
4. A wewly created dashboard will appear as follows : -

Powered by: Active Intelligence Server
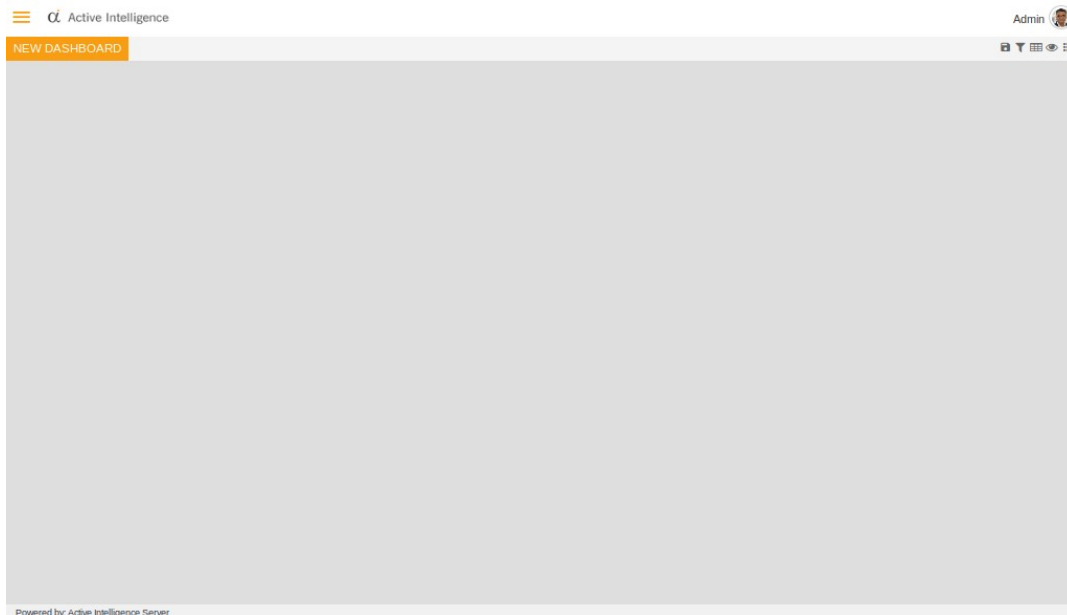
Dashboard Preview and Edit

- Dashboard preview shows the view of dashboard.
- Edit option allows the user to edit the dashboard.
- To preview a dashboard a user should follow below steps:
- Note: In Preview Mode, users are not allowed to edit or make changes to the dashboard.
- For Previewing the Dashboard and Editing the Dashboard, follow the steps below:
    - By default when user opens or create a dashboard it is in preview mode.
    - To edit a dashboard a user should click on 📝 icon from
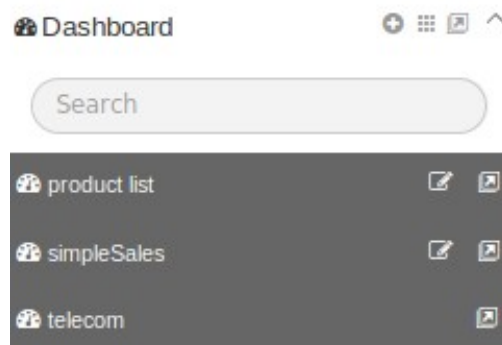
- In Edit mode, User can make changes to the existing dashboard and choose from a variety of options as shown in the top right corner of the Dashboard.

◉	Preview Mode
⚙	Dashboard Settings
▼	Filter Pane
▣	Instant Message
▱	Clear Filter
💾	Save Dashboard
🖼	Embed

	Component
▦	Component

Dashboard Widgets

- Dashboard Widgets enable users to create different visualization which can be used in the dashboard to see collective information in a single view.
- Widget makes it easy to customize the content and to arrange the data in different formats.
- The Widget can be linked with each other or users can create a common filter to apply the values to all the widgets in the open dashboard.
- The common values must be available in order to link or filter all the widgets.

Dashboard Widgets contains following items:

- Tables
- Charts
- Maps
- Reports
- KPI
- Custom Visualisation
- Image & Text
- Pivot
- Report Management
- Dynamik Link
- Scratch Pad
- Form Builder
- Dashboard Settings
- Filter
- OLAP
- Drill

To Add Widgets, follow these steps:

1. Click on ✐ Edit Mode and click on ⠿ Component icon/button from the top right corner menu, it will open up the list of the available components which user can use to create a dashboard.
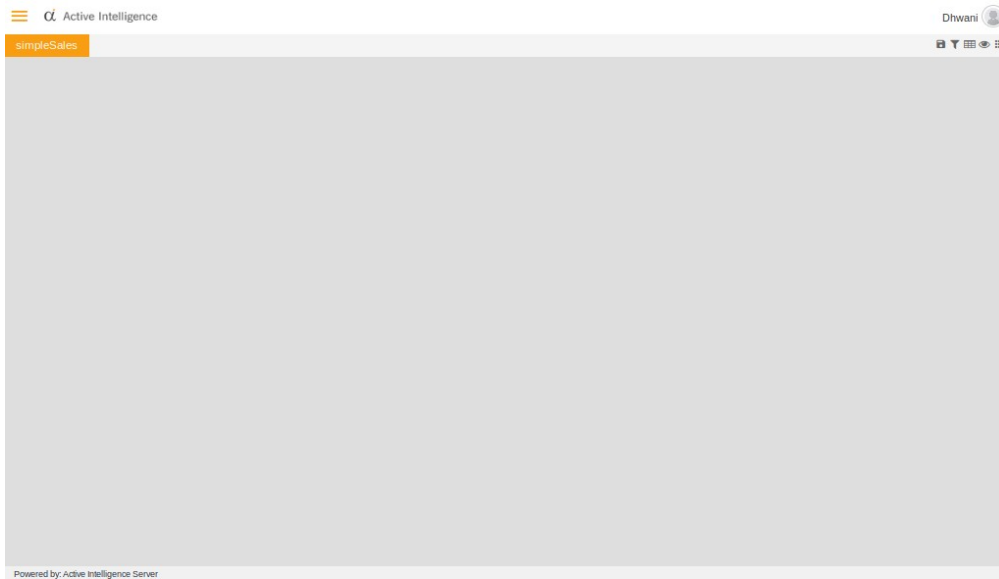
2. Click on the desired component from the available list to add a component to the dashboard canvas.
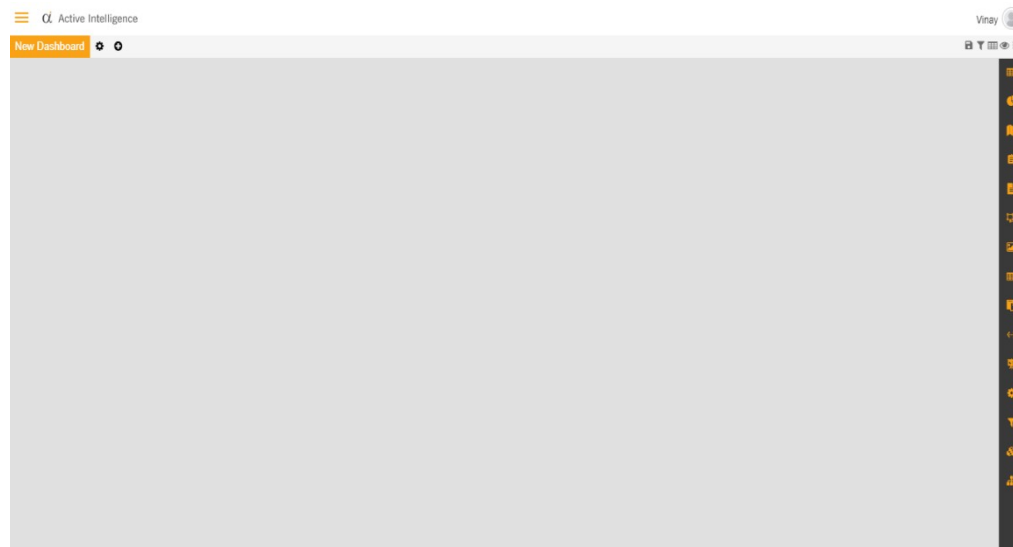
3. Click on the component from the menu, the widget configuration box would open up, connect with the data source and customize the widget properties using the options available.

Country	Phone	City
USA	6175557555	Brickhaven
Japan	+81 06 6342 5555	Osaka
Finland	981-443655	Oulu
Belgium	(02) 5554 67	Bruxelles
Canada	(514) 555-8054	MontrÃ©al
France	26.47.1555	Reims
Italy	035-640555	Bergamo
Canada	(604) 555-4555	Tsawassen
Belgium	(071) 23 67 2555	Charleroi
Austria	6562-9555	Salzburg
France	78.32.5555	Lyon
Sweden	0695-34 6555	BrÃ¤cke
USA	4155554312	Brisbane
USA	7025551838	Las Vegas
Australia	+61 2 9495 8555	Chatswood

4. After adding Widgets to the dashboard, remember to Click ⬛ Save icon from the top right corner menu to save your dashboard as shown in the above image.

Tips:
- You can add multiple tabs and widgets in a single dashboard.

Tables

- Tables widget enable users to add any numbers of columns from the existing database tables simply by selecting the columns, tables widget is really helpful when accessing a large number of data.
- To add a Table Widget in the dashboard, follow the steps below:

1. Click on ⋙ the Component icon from the top right corner menu, a list of the available component will open up as follows:

2. Click on Component from the list of the component into the dashboard, a configuration box would open as follows:

3. Select the dataset from the drop-down list.
4. Adjust row height and header height.
5. Following images are the example of a table.

6. Provide a name to your widget and select the desired source of data.
7. Click on Submit button to create the Table widget.

Charts

- Charts widget will enable users to create a variety of charts using their own data to create customized charts to see the data in different visualization.
- To Add a Chart Widget in the dashboard, follow the steps below:
  1. Click on ⠿ Component icon from the top right corner menu, a list of the available component will open up as follows:

  2. Click on 🌑 Charts Component from the list of component into the dashboard, a configuration box would open as follows:
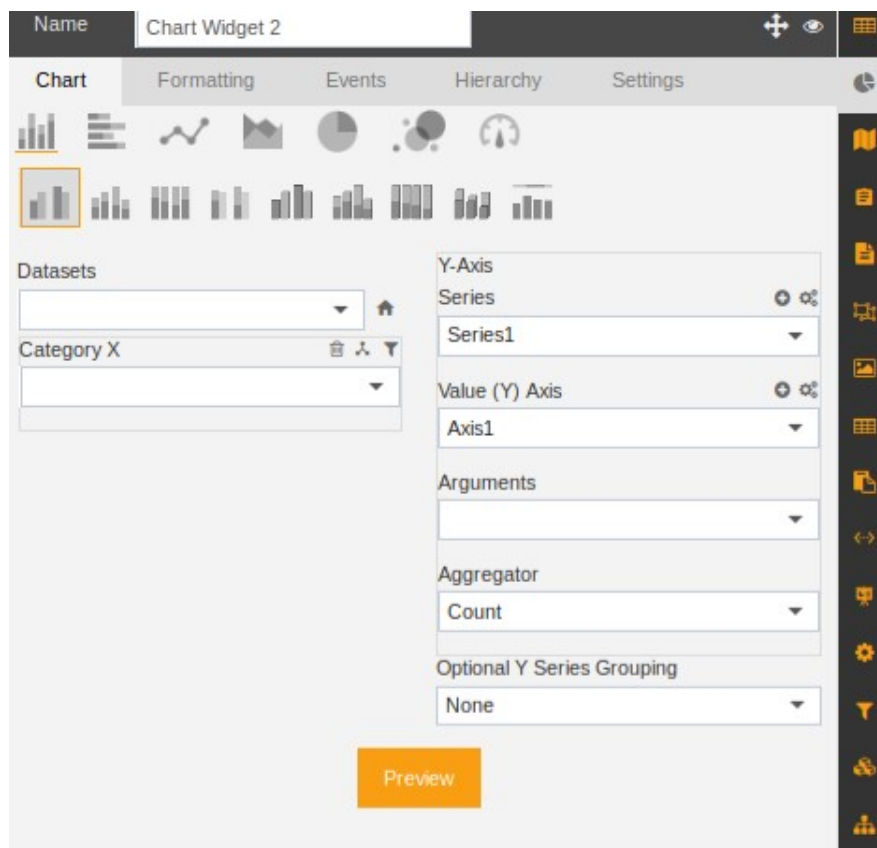
3. Select the type of chart you want to use and select datasets from the drop-down menu.
4. From available Data Columns drag and drop columns or hierarchy to Category (X) Series.
5. Select appropriate Aggregator from drop down.
6. Select Arguments from the drop-down.
7. Click on preview.

Formatting

- Formatting tab shows the following options:
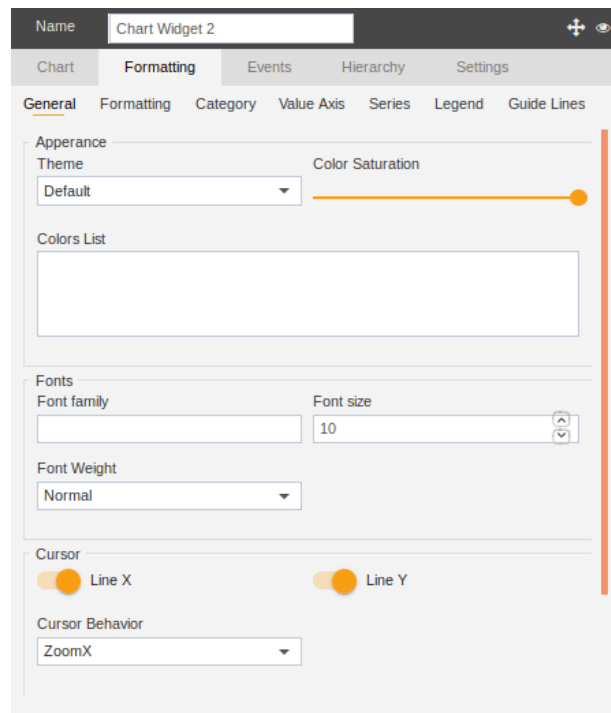
- In the General tab, the user can change the appearance theme, can change the colour saturation, font size, font family and font weight.
- Cursor behaviour can be changed by selecting the drop-down menu.
- Chart Scrollbar can be adjusted by selecting the drop-down list.
- Also, a value can be selected from value scrollbar the drop-down list.
- Category tab includes following options.
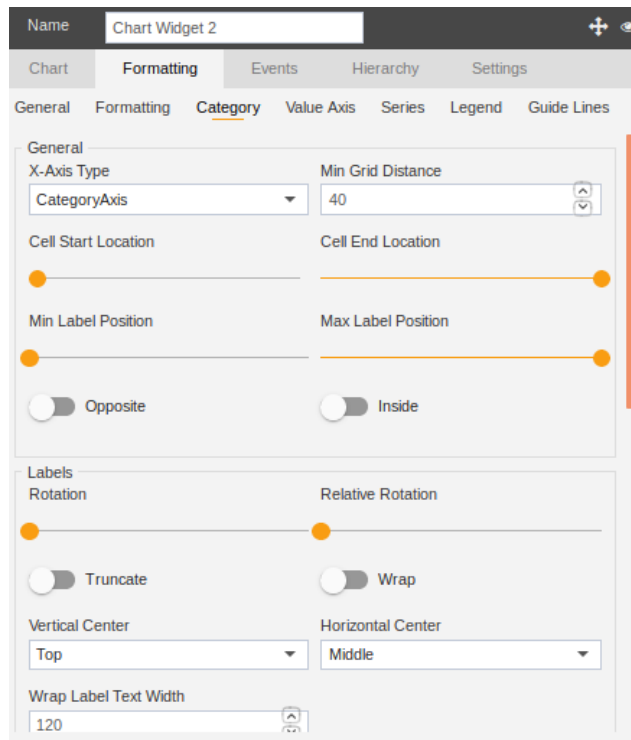
- The User can change the X-axis type, min grid distance, cell start, and end location, min-max label position, the user can wrap and truncate if overlapping issues arise.
- The User can also change the axis colour, line colour, and grid colour.
- Value axis tab includes the following options:
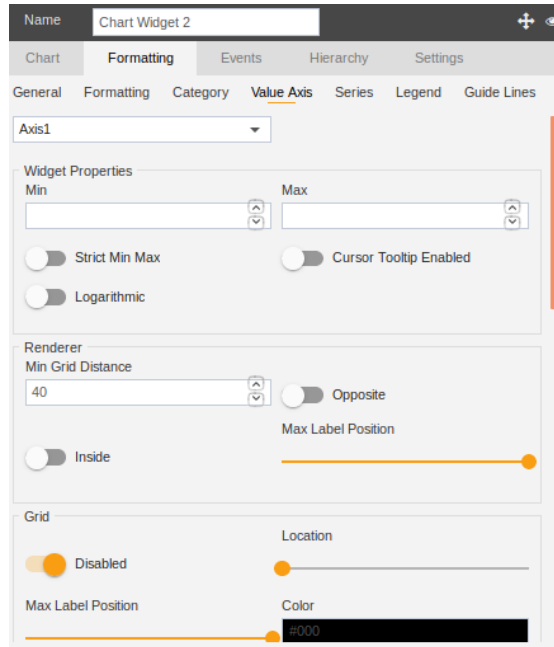
- Here, the user can change the widget properties, can renderer, can change the grid properties, can change the label properties, also can do the title formatting.
- The series tab includes the following options:
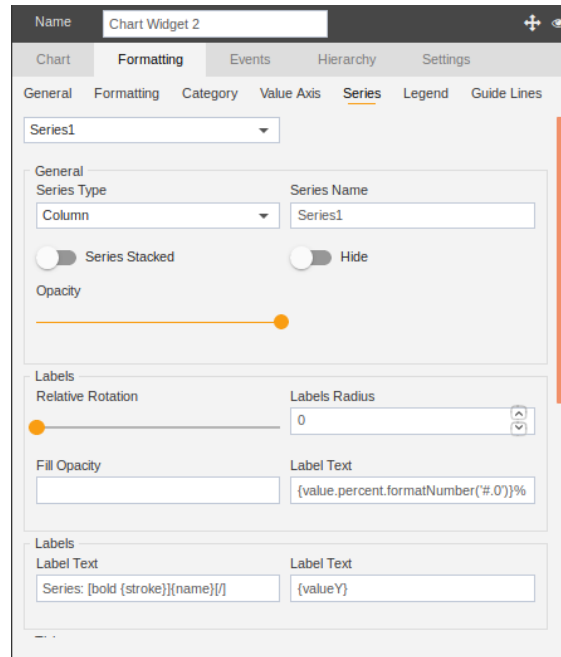
- Here, the user can change the series type, series name, opacity, series' label properties, tooltips, ticks and so on.

Events

- Events show the events on axis.
- Following image describes the use of events.
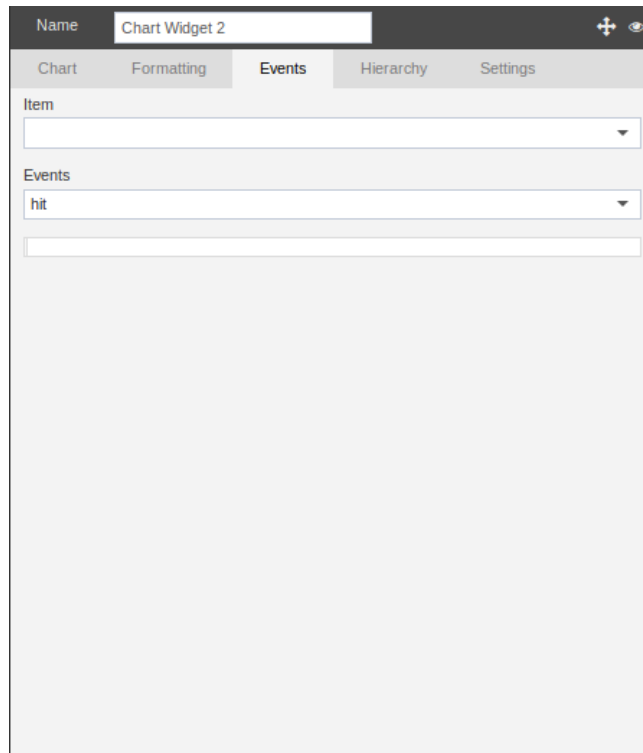
- Select the item on which event is to be fired.
- Then, select the type of event from the drop-down list.

Hierarchy

- A Hierarchy describes the order of dataset columns.
- The user can set the hierarchies according to their need.
- Below image shows the hierarchy.
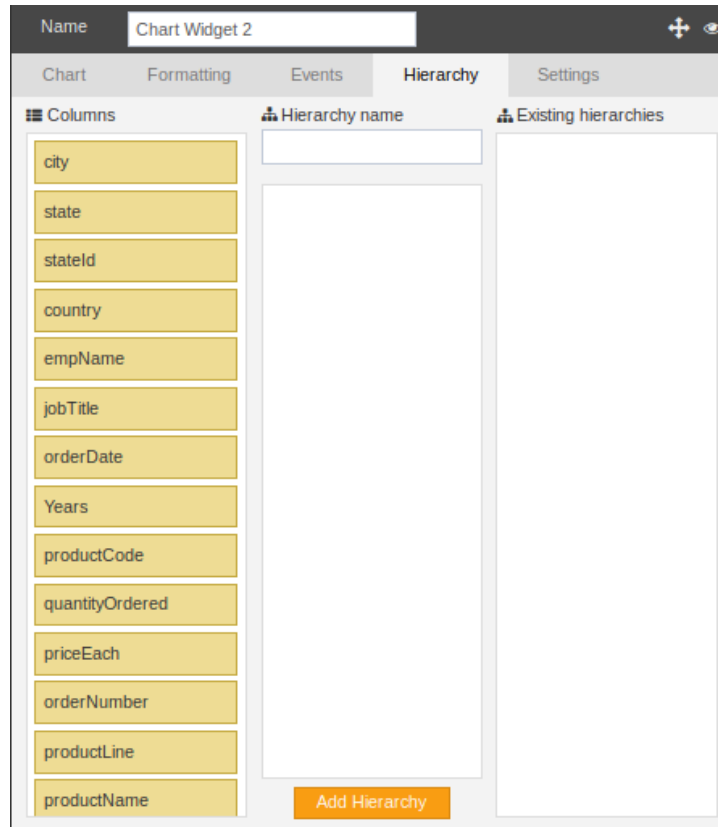
Settings

- Settings tab helps the user to set the widget properties, background properties, widget title properties, sub-title properties, and border properties.
- Following image shows all options.

Maps

- **Maps** widget will enable users to create a variety of maps using their own data to create customized maps to see the data in map visualization.
- Maps provide the following functionalities:-

    1. Create Map
    2. Refresh
    3. Copy
    4. Move
    5. Dynamic Link
    6. Maximize
    7. Delete
    8. Move to scratch pad
    9. Help

Create Map

- To Add a **Map Widget** in the dashboard, follow the steps below:
    1. Click on ⠿ **Component** icon from the top right corner menu, a list of the available component will open up as follows:

    2. Click on 🗺 Component from the list of the component into the dashboard, a configuration box would open as follows:
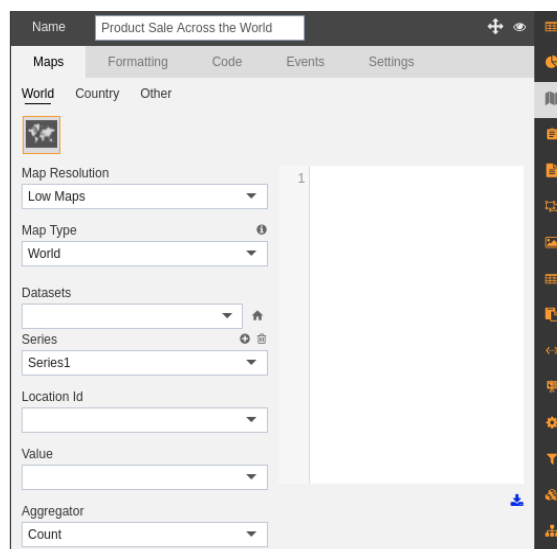
3. Following sub-tabs are included in create map as shown in the figure above:-
   - Maps
   - Formatting
   - Code
   - Events
   - Settings
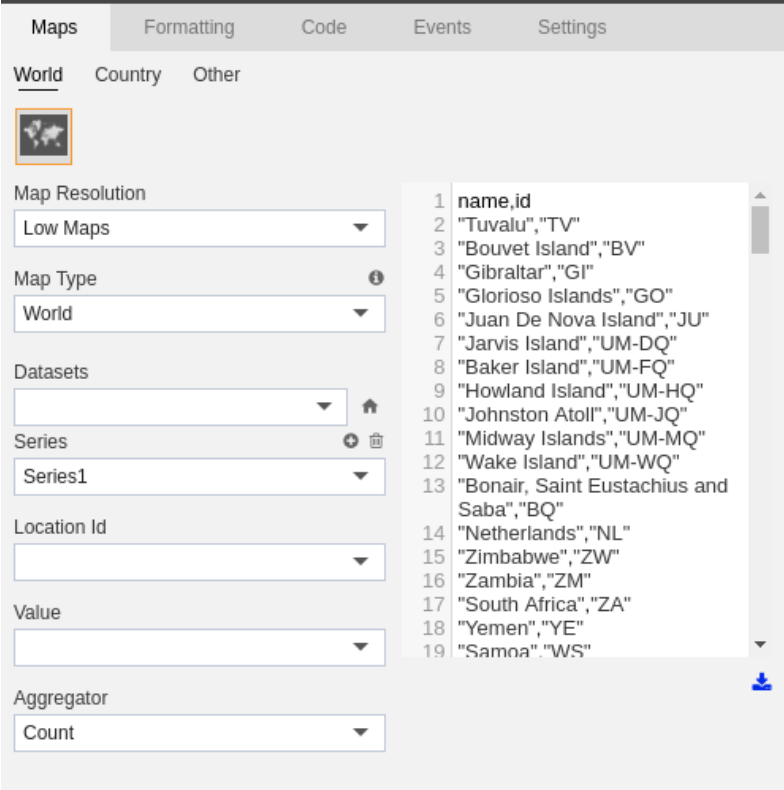
The main purpose of the Maps tab is to enable the user to make a selection of the type of map he/she wants to create as shown below:-
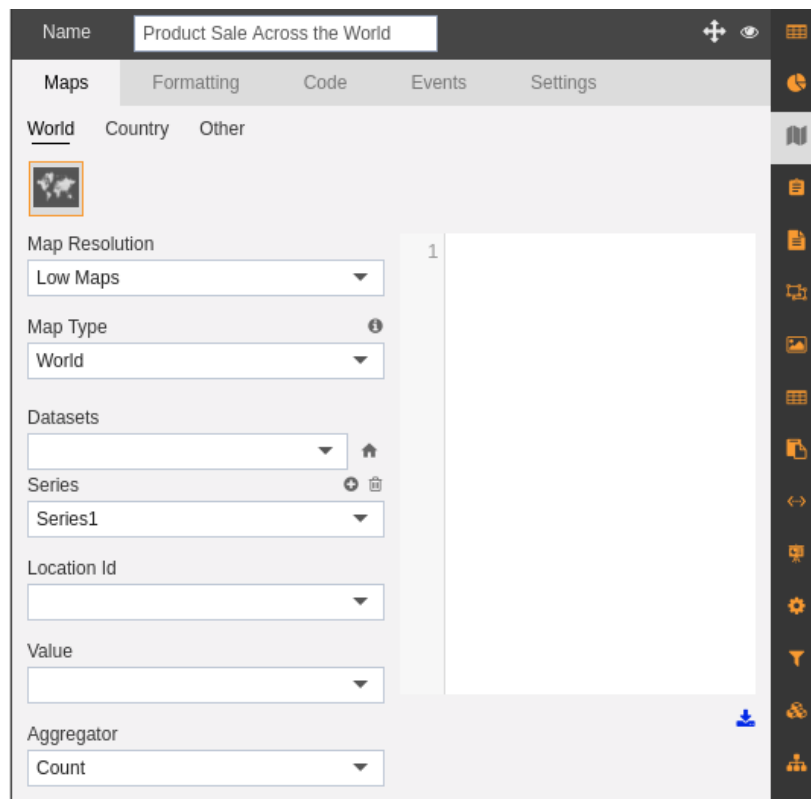
- You can specify the name of your map widget in the Name section as mentioned above.
- You can select from the choices of Maps as follows:-

    1. World
    2. Country
    3. Other

- You can understand each of them in detail in following subtabs:-

World

1. We will be working with the World Map in this case.
2. You can mention the resolution of your Map to be Low/High from the drop-down in Map Resolution. (By default Low Maps is selected)
3. You can select Map Type from the dropdown as follows:-
   a. **World:-** To create a map that depicts data for whole world
   b. **World India:-** To create a map that depicts data for the whole world including POK region.
4. You can also generate ID and name of different countries across the world that you want to include in your World Map by clicking on ⓘ which will generate all the ID's as follows:-

5. You can also download this list by clicking on ⬇ as shown in the figure above.
6. Select **Sales.cds** from the Datasets dropdown as shown below to depict the details of the products from across the world:-
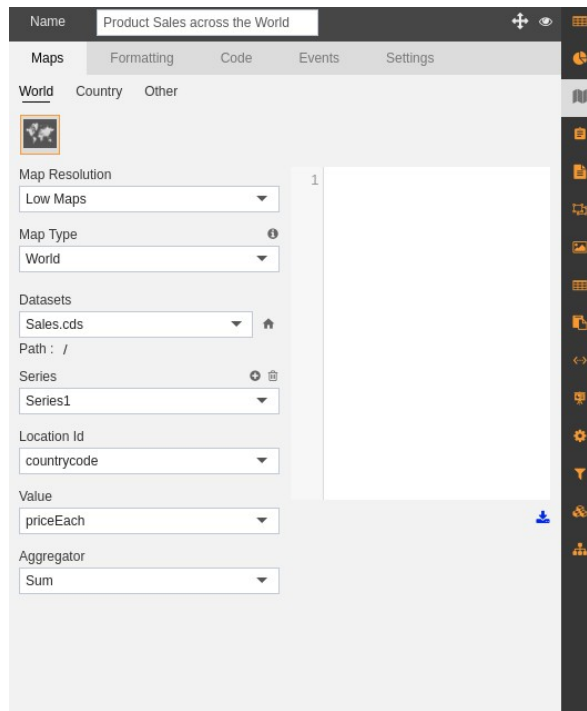
7. Similarly, select Series as Series1,
8. Location Id as country code in order to map by the code of the country.
9. Mention the value as price each and Aggregator as Sum.
10. This will give the sum of the prices of different products sold across different countries of the world.
11. Save your changes by clicking on ⊟ button on the top right corner above the map.
12. After making these changes in Maps, your map widget will be depicted as below:-
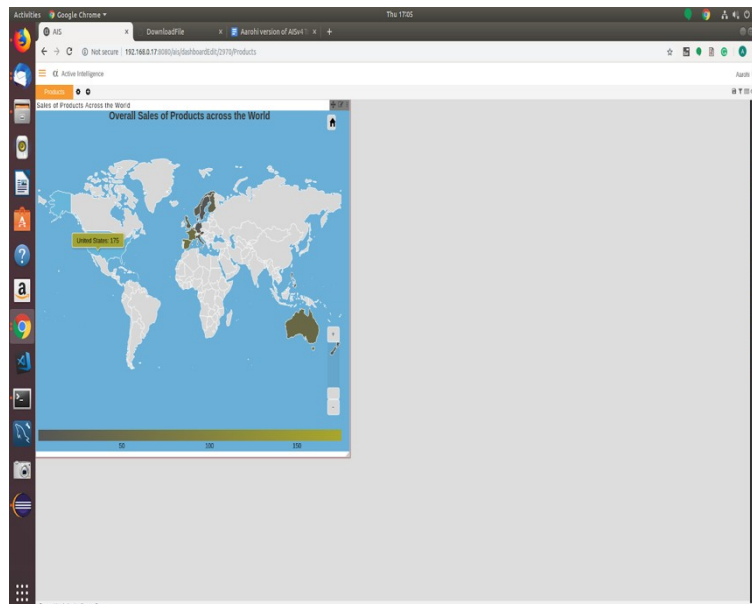
13. In a similar manner, you can also create charts for country and other regions.
14. You can move your widget anywhere on the screen by clicking on ⊹ .
15. You can again go to edit mode by clicking on 🖉 to perform other changes in Map widget.

Country

1. We will be working with the Country Map in this case as shown below:-
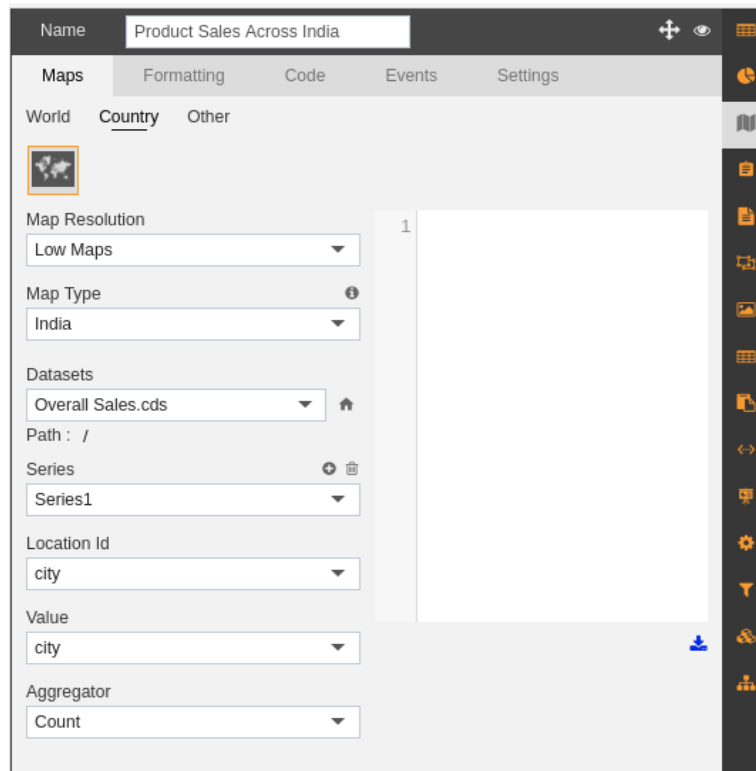
2. You can mention the resolution of your Map to be Low/High from the drop down in Map Resolution. (By default Low Maps is selected)
3. You can select Map Type from the drop-down to select the country of your choice.
4. You can also generate ID and name of different countries across the world that you want to include in your World Map by clicking on ⓘ which will generate all the ID's as follows:-
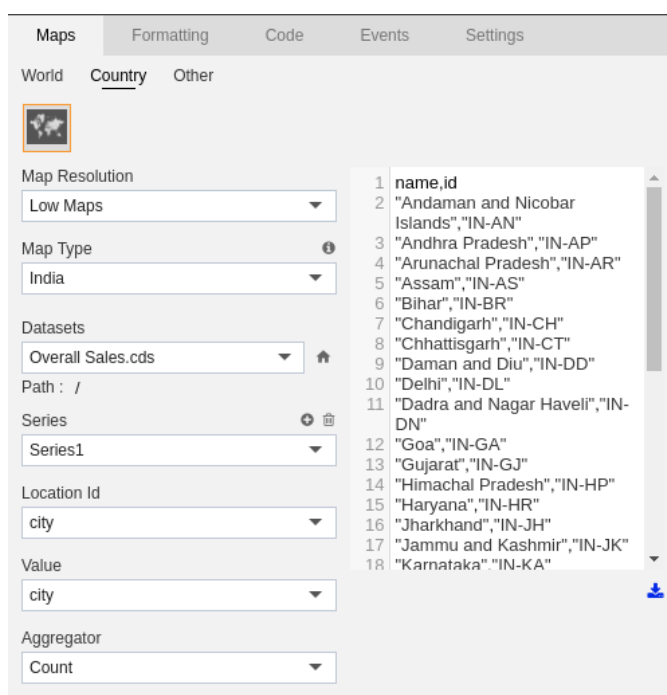
5. You can also download this list by clicking on ⬇ as shown in the figure above.
6. Select **Overall Sales.cds** from the Datasets dropdown as shown below to depict the details of the products from across India:-
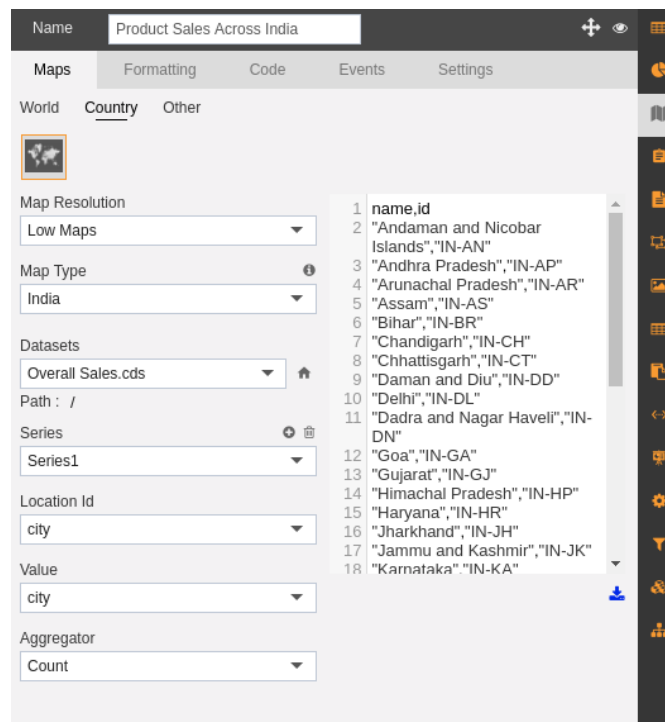
7. Similarly select Series as Series1, Location Id as the State ID, value as ExtendedPrice and Aggregator as sum as shown in the figure.
8. Save your changes by clicking on 💾 button on the top right corner above the map.
9. After making these changes in Maps, your map widget will be depicted as below:-
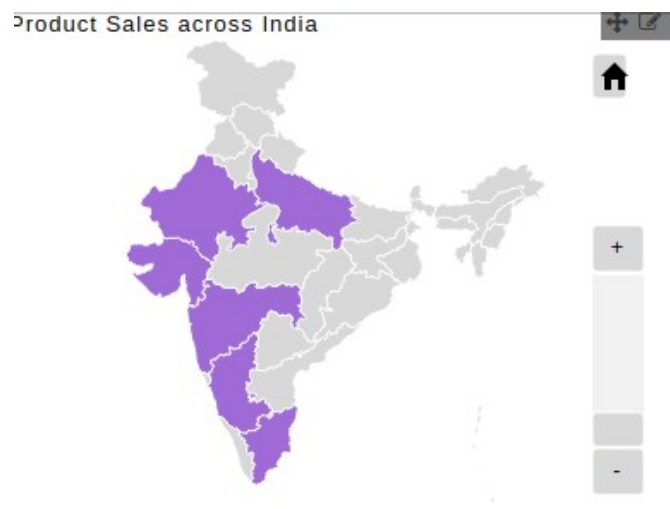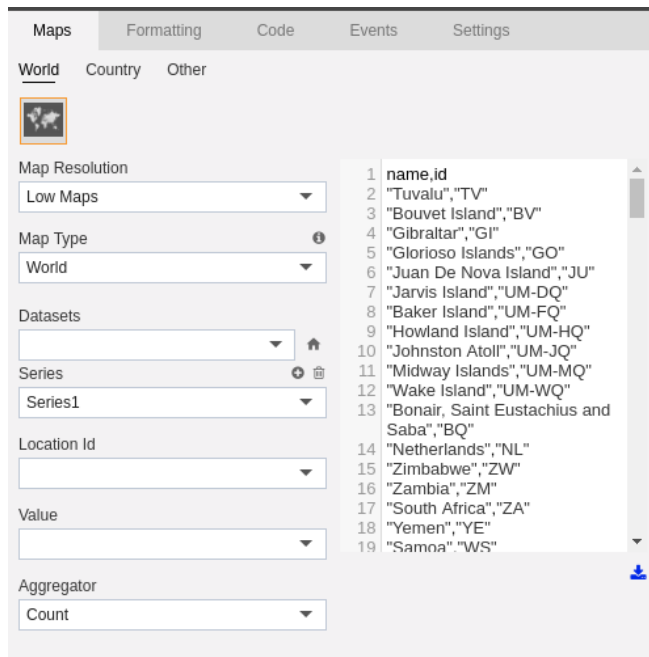
10. In a similar manner, you can also create charts for the world and other regions.
11. You can move your widget anywhere on the screen by clicking on ✛ .
12. You can again go to edit mode by clicking on ✎ to perform other changes in Map widget.

Other

1. We will be working with the Other Map in this case.
2. You can mention the resolution of your Map to be Low/High from the drop-down in Map Resolution. (By default Low Maps is selected)
3. You can select Map Type from the dropdown as follows:-

You can also generate ID and name of different countries across the world that you want to include in your World Map by clicking on ❶ which will generate all the ID's as follows:-

1. You can also download this list by clicking on ⬇ as shown in the figure above.
2. Select **Overall Sales.cds** from the Datasets drop-down as shown below to depict the details of the products from across the world:-
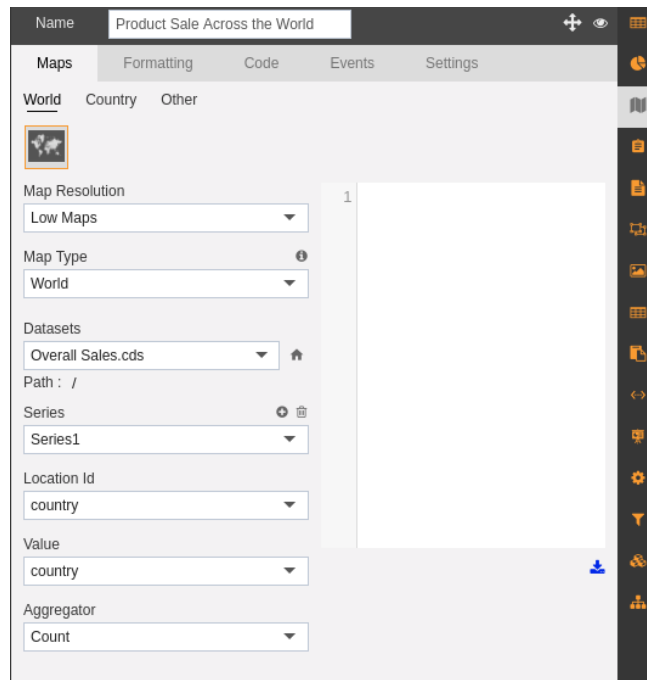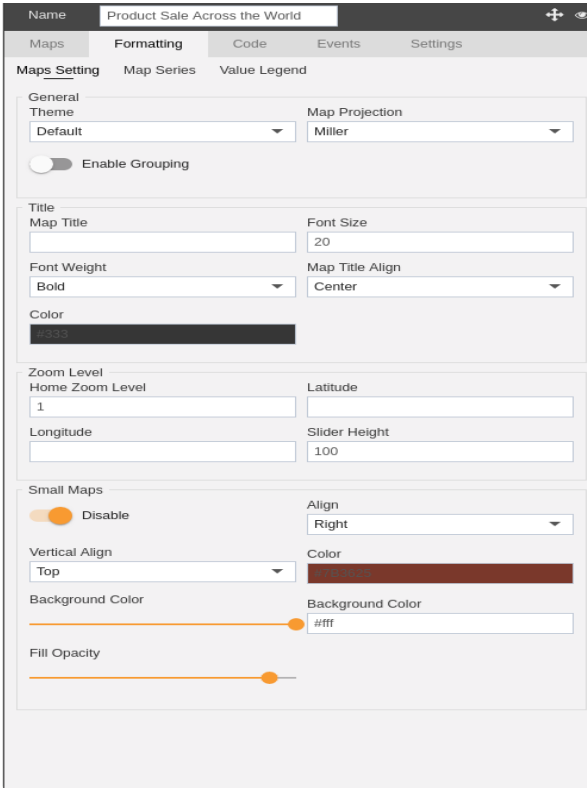
1. Similarly select Series as Series1, Location Id as the country id, value as country and Aggregator as Count as shown in the figure.
2. Save your changes by clicking on ⊟ button on the top right corner above the map.
3. After making these changes in the Maps, your map widget will be depicted as below:-

4. In a similar manner, you can also create charts for country and other regions.
5. You can move your widget anywhere on the screen by clicking on ⊕ .
6. You can again go to edit mode by clicking on ▣ to perform other changes in Map widget.

Formatting

1. Click ✎ on your current map widget in order to perform formatting.
2. Go to **Formatting** tab and the following screen will be displayed:-

3. There are three sub-tabs under the formatting tab as follows:-

   • Map Settings
   • Map Series
   • Value Legend

4. Let us understand all these tabs in detail:-

Map Settings

1. The Map Settings tab allows you to change the settings of your map as follows:-
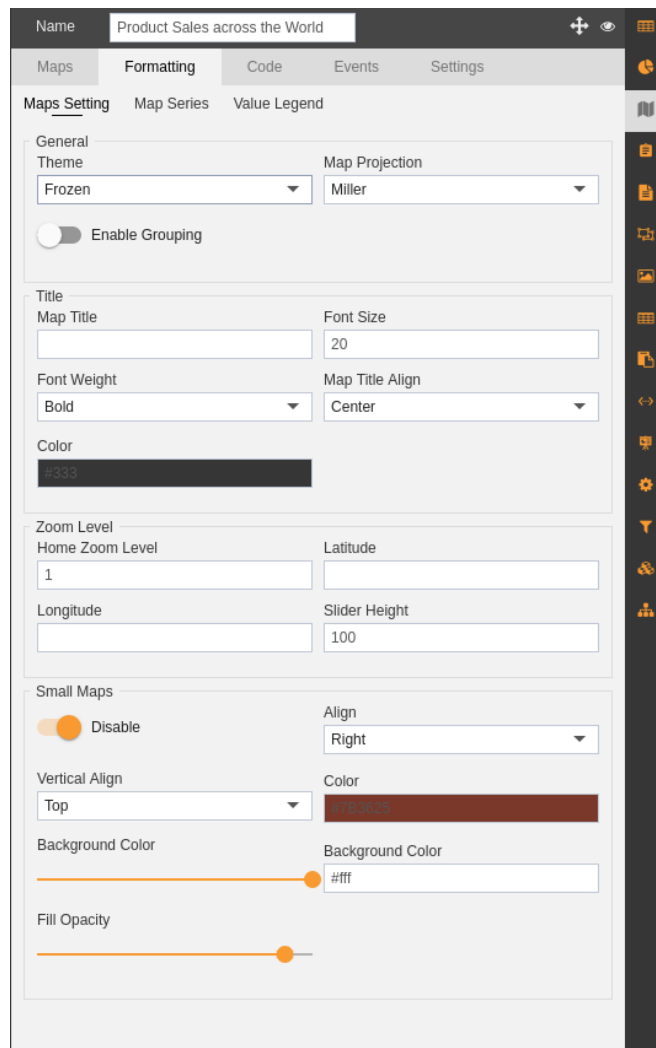
2. In General Settings, select Theme as Frozen and Map Projection as Miller as shown in the figure above.
3. You can also select Enable Grouping if you desire to group your data.
4. Now in the Title Section, enter data in the text boxes as shown in the figure below:-
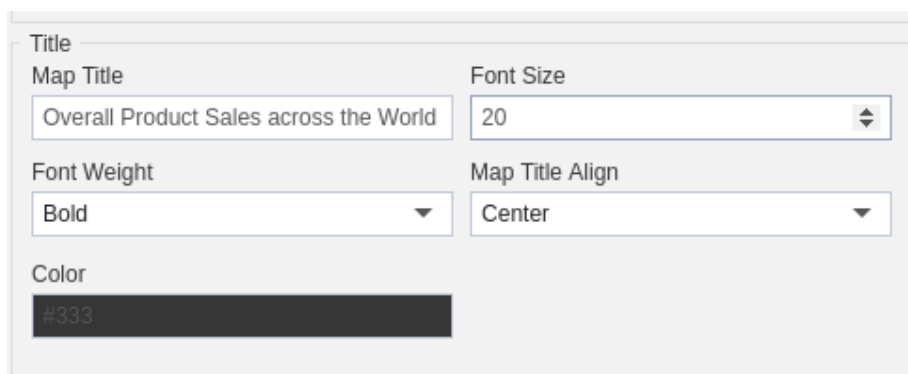
5. Your World Map will now look as below:-

Product Sales across the World

Overall Product Sales Across the World
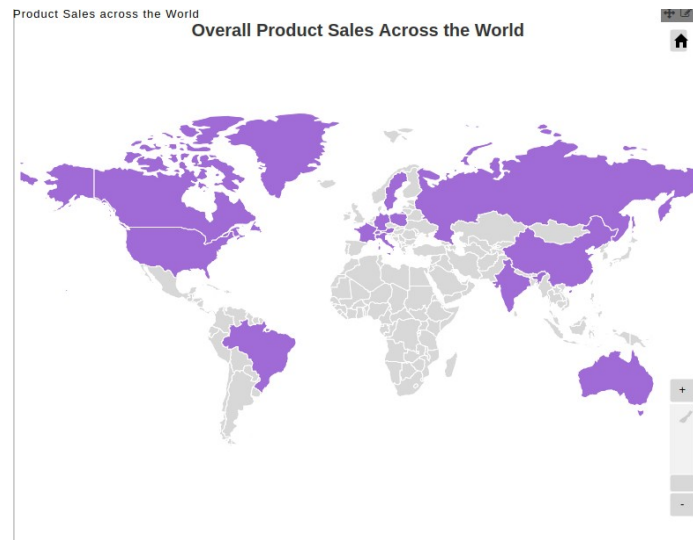
6. You can change the zoom details as follows:-

Zoom Level

Home Zoom Level
1

Latitude
2

Longitude
1

Slider Height
100

7. Here you can change the zoom of the map from either latitude or longitude or both as depicted above. Perform the changes as shown in this figure to your Zoom level.
8. If you want to show a smaller scale of map besides your original map, enable "small map" functionality as follows:-

Small Maps

Disable

Align
Right

Vertical Align
Top

Color
#7B3625

Background Color

Background Color
#fff

Fill Opacity

9. Keep the Align Right and Vertical Align Top and leave everything else as it is.
10. After this, your world map will look as follows:-

Overall Product Sales Across the World

Map Series

1. You can change the settings for a series of the map using map series.
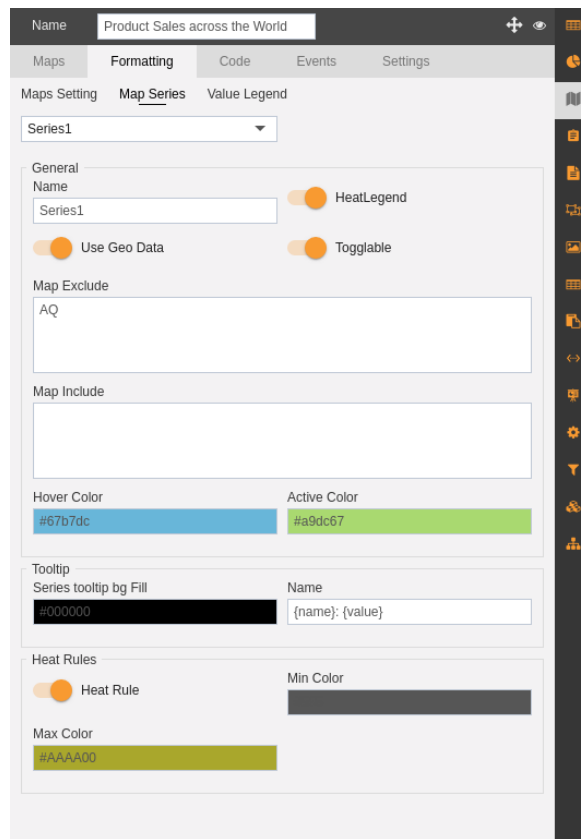
2. In General Settings, enter the name as shown above Series 1.
3. You can show heat legend, geodata and keep the data togglable as shown in the image above.
4. Map Exclude:- (When grouping is applied, you can exclude the part of a region)
5. Map Include:- (When grouping is applied, you can include a part of a region)
6. You can change the hover colour, active colour, heat rule, min colour, and max colour as shown in the figure above.
7. Finally, after saving the changes using ▣ following screen will be displayed.
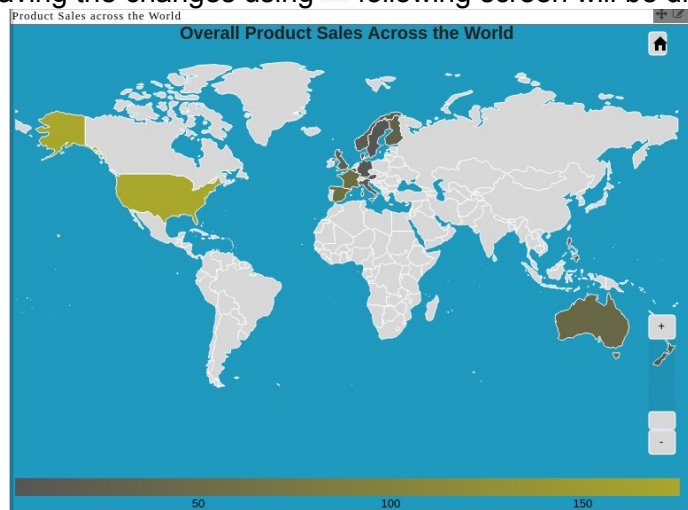
8. The line at the bottom of the map depicts the heat legend which depicts a range of colour from the maximum value to the minimum total price of products.

Value Legend
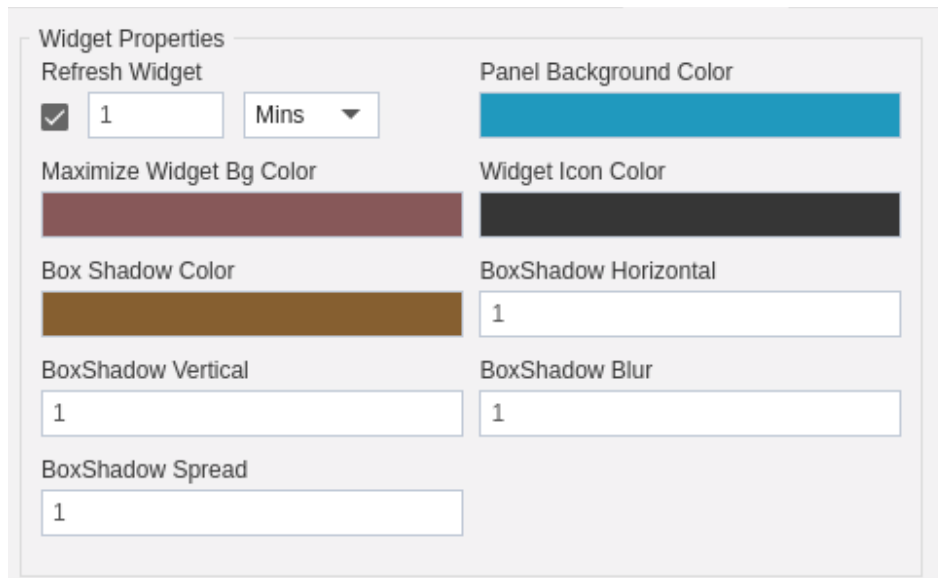
Code

1.

Events

Settings

1. Click on on your current map widget in order to change settings of the map.
2. You can change the settings of your map widget as follows:-
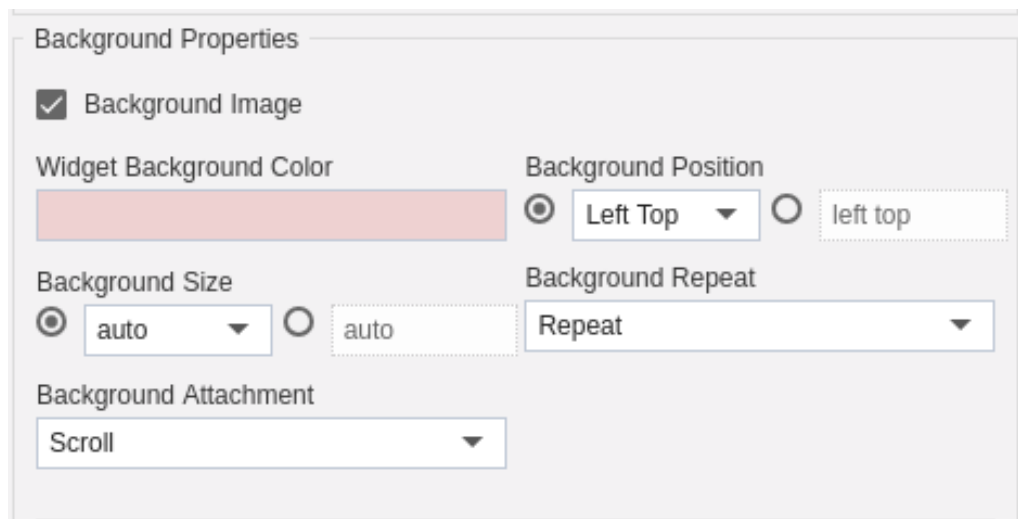
3. Here in the above figure, widget properties have been set.
4. Widget will be refreshed after every single minute.
5. You can set the Panel Background Colour, Maximize widget bg colour, widget icon colour, box shadow colour and other similar properties related to widget as shown above.
6. You can also change the background image as shown below:-

7. You can set the Title

   properties as shown below:

8. Here you can set the position of title, title colour, font size, font style, font family and font weight.
9. You can set the Border to your map as follows:-

10. Here we have set Border Type as Solid, width 0.5, colour grey, top left radius 0.5, top right radius 0.5, bottom left radius 0.5 and bottom right radius 0.5.

11. In the similar manner you can set Sub Title properties as shown above.
12. You can also hide the data from certain devices, show filter value or wait for filter by checking the checkboxes shown above (Filter will be discussed in detail in later sections).
13. Now Click on 🔲 button in order to save the map.
14. Finally you map will be displayed as follows:-

Product Sales across the World

Overall Product Sales Across the World

200   400   600   800   1,00

Refresh

1. In order to refresh your map click on the side elapses ▮ in your map widget.
2. This will open the following menu:-

Refresh
Copy
Move
Dynamic Link
Maximize
Delete
> Move to scratch pad
Help

3. Click on Refresh and your map will be refreshed.

Copy

1. In order to copy your map click on the side elapses ⚏ in your map widget.
2. This will open the following menu:-
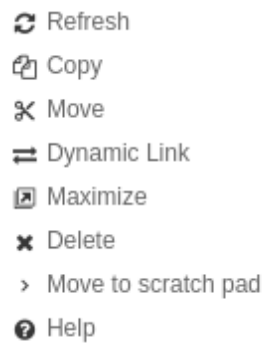
3. Click on copy which will open the following dialog box:-

4. Here you can specify the name you want to give while copying the map.
5. The default tab is products. You can create a new tab from here by clicking on `Create Tab`
6. This opens the following dialog box:-
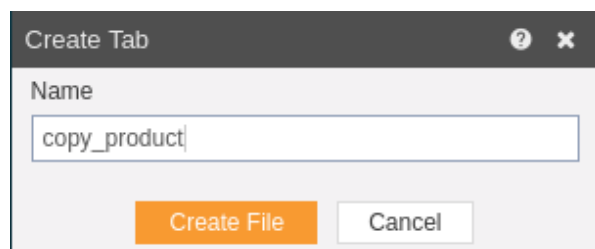
7. Click on `Create File` in order to save the tab.
8. Now select copy_product from dropdown as follows:-

9. Click on **Copy** to copy the map.
10. You can see a new tab "copy_product" has been created where our map is copied.

Move

1. In order to move your map, click on the side elapses ⦙ in your map widget.
2. This will open the following menu:-
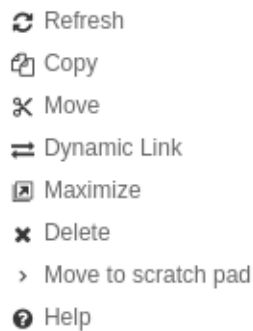
3. Click on copy which will open the following dialog box:-
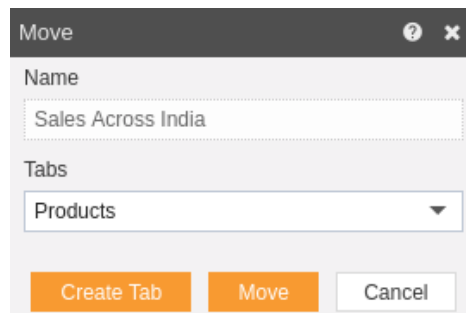
4. Here you can specify the name you want to give while copying the map.
5. The default tab is products. You can create a new tab from here by clicking on Create Tab
6. This opens the following dialog box:-
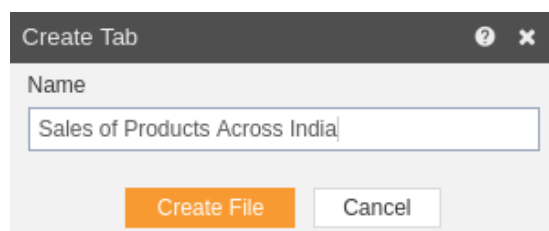
7. Click on Create File in order to save the tab.
8. Now select "Sales of Products Across India" from dropdown as follows:-
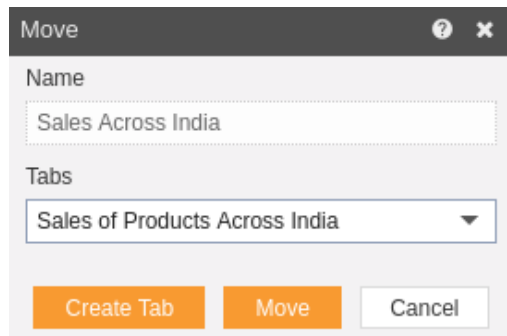
9. Click on Move to copy the map.
10. A new tab "Sales of Products Across India" has been created where our map is moved.

Dynamic Link

1.

Maximize

- In order to maximize your map click on the side elapses ⬛ in your map widget.
- This will open the following menu:-
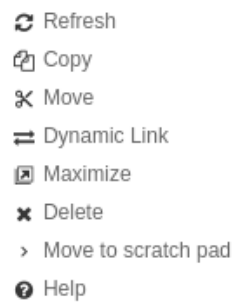
- Click on Maximize and your map will be maximized.

Delete

- In order to delete your map click on the side elapses ⦙ in your map widget.
- This will open the following menu:-


```
↻  Refresh
🗐  Copy
✂  Move
⇄  Dynamic Link
↗  Maximize
✖  Delete
>  Move to scratch pad
❷  Help
```
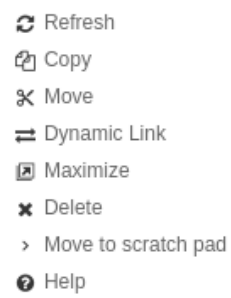
- Click on Delete and your map will be deleted.

Move to scratch pad

- In order to move your map to the scratch pad click on the side elapses ⊞ in your map widget.
- This will open the following menu:-
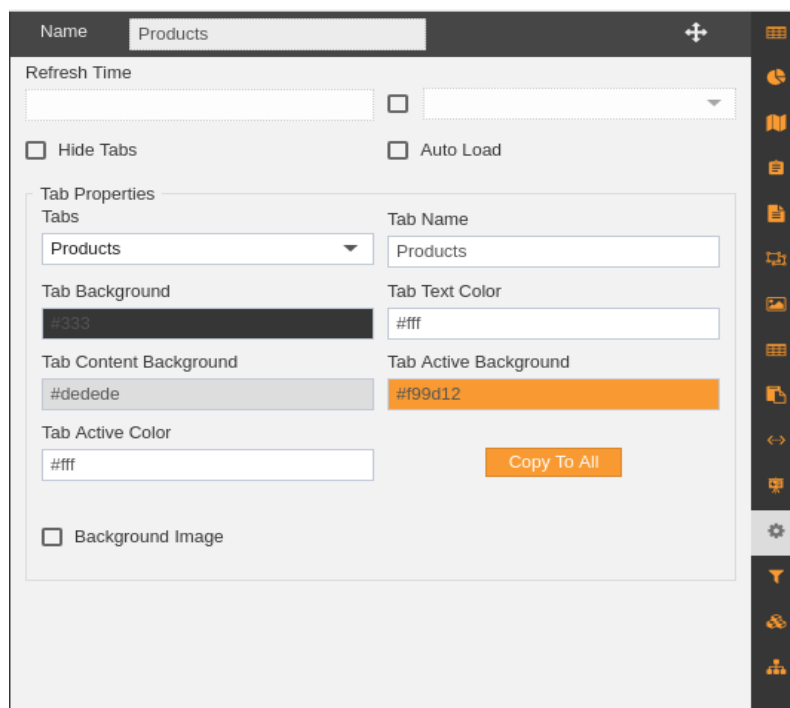
Click on Move to the scratch pad and your map will be moved to the scratch pad as follows:-

- The detailed description regarding the scratch pad will be provided in the scratch pad tutorial.

Help

- In order to access AIS help document related to map widget click on the side elapses ▮ in your map widget.
- This will open the following menu:-

       🔁 Refresh
       🗐 Copy
       ✂ Move
       ⇄ Dynamic Link
       ⬈ Maximize
       ✖ Delete
       › Move to scratch pad
       ❓ Help
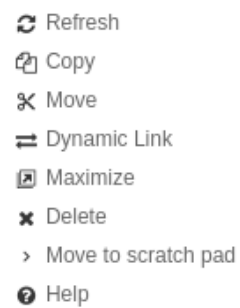
- Click on Help and you will be redirected to AIS help documents.

Reports as widget

- Report widget enables the user to embed the reports created externally using BIRT, jasper or pentaho into the dashboard.
- Reports provides following functionalities:-

  1. Create Report
  2. Refresh
  3. Copy
  4. Move
  5. Dynamic Link
  6. Maximize
  7. Delete
  8. Move to scratch pad
  9. Help

Create Report

- To Add a **Report Widget** in dashboard, follow the steps below:

1. Click on ⊞ **Component** icon from the top right corner menu, a list of the available component will open up as follows:

2. Click on 🗎 Component from the list of component into the dashboard, a configuration box would open as follows:
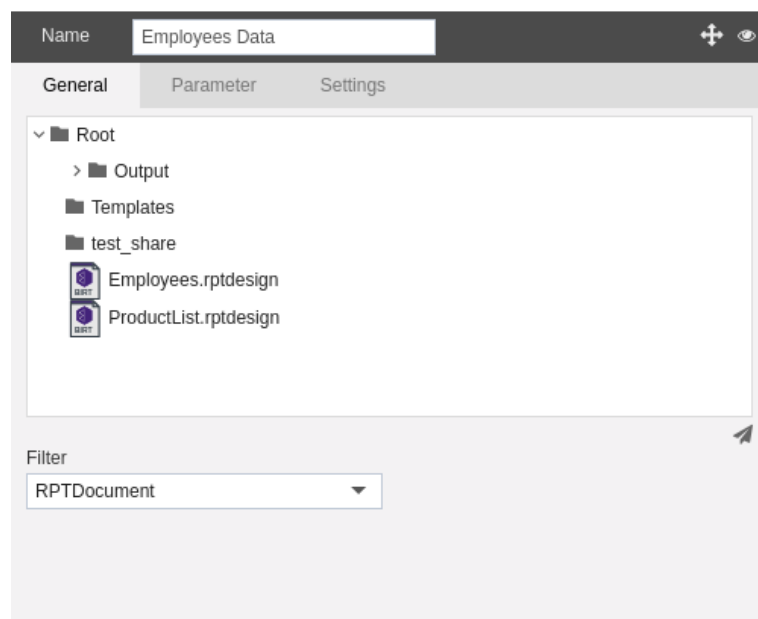
3. Following sub-tabs are included in create map as shown in the figure above:-

Scratch Pad

Pivot

- **Pivot** provides create tables or heatmaps by selecting the appropriate datasets in the dashboard.
- Pivot includes the following functionalities:-
  - Create Pivot
  - Refresh
  - Copy
  - Move
  - Dynamic Link
  - Maximize
  - Delete
  - Move to scratchpad
  - Help

Create Pivot

1. To add a **Pivot** in dashboard, follow the steps below:-

2. Click on ⚏ **Component** icon from the top right corner menu, a list of the available component will open up as follow.

3. Click on ▦ Component from the list of component into the dashboard, a configuration box would open as follows:
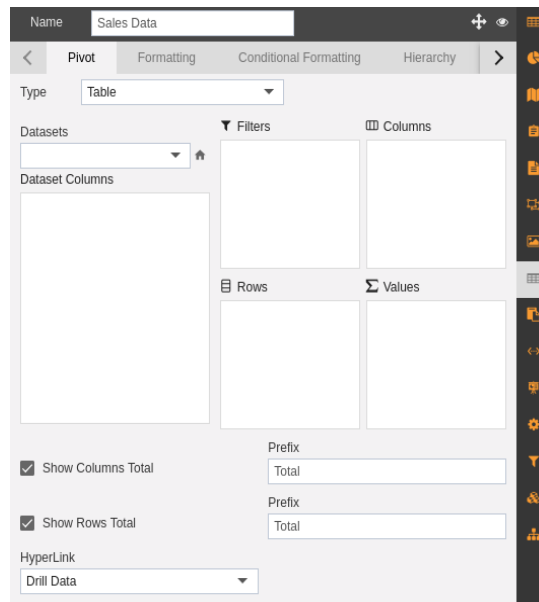
4. Following sub-tabs are included in create map as shown in the figure above:-
   - Pivot
   - Formatting
   - Conditional Formatting
   - Hierarchy
   - Settings
5. Let us understand each tab in detail in the following sections:-

   1. The main purpose of the Pivot tab is to enable the user to select the dataset and whether the pivot should be in form of table or heatmap.
   2. Provide a name to the Pivot as Product Count Data.
           6. Select the Type i.e. if you want to display the table or heatmap. For this example, we have considered Type as Table.
           7. Select the **Sales.cds** dataset from the dropdown menu as shown in below figure:-
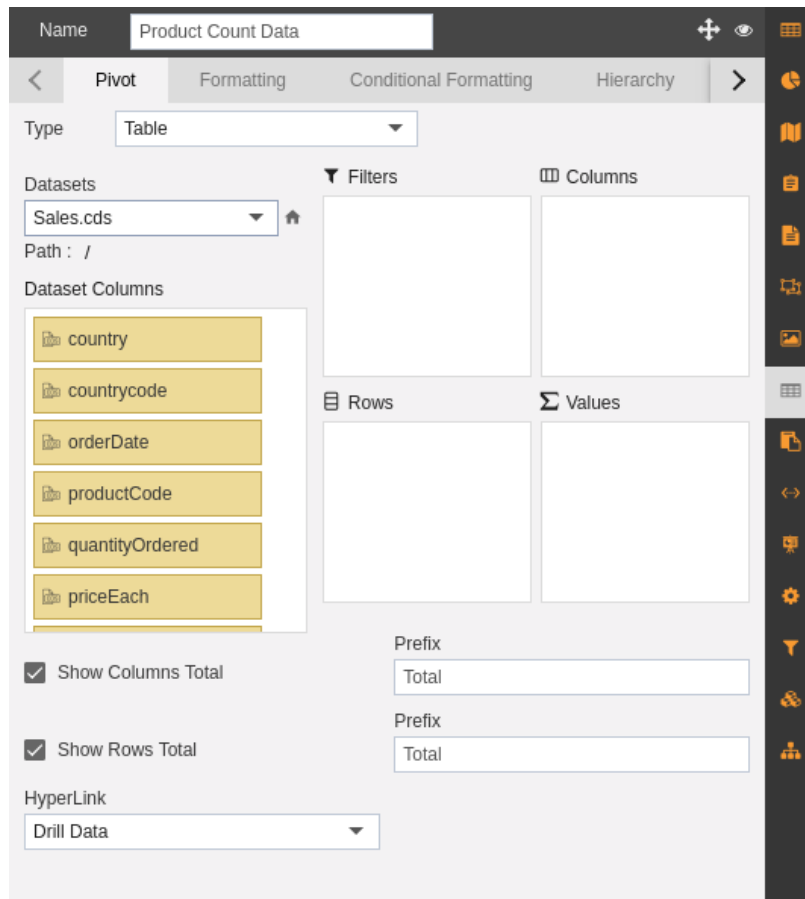
6. Drag and drop country in Columns and productLine in Rows and following screen will be displayed:-
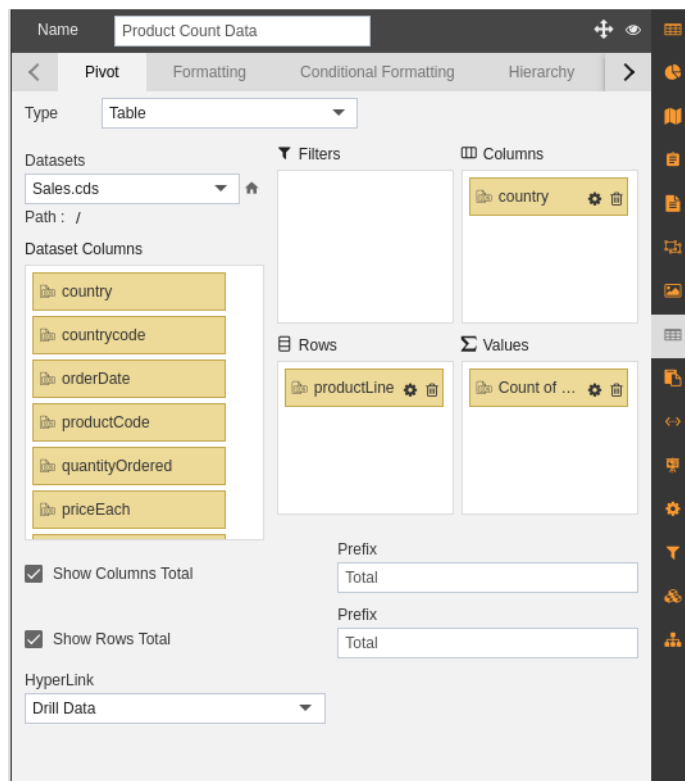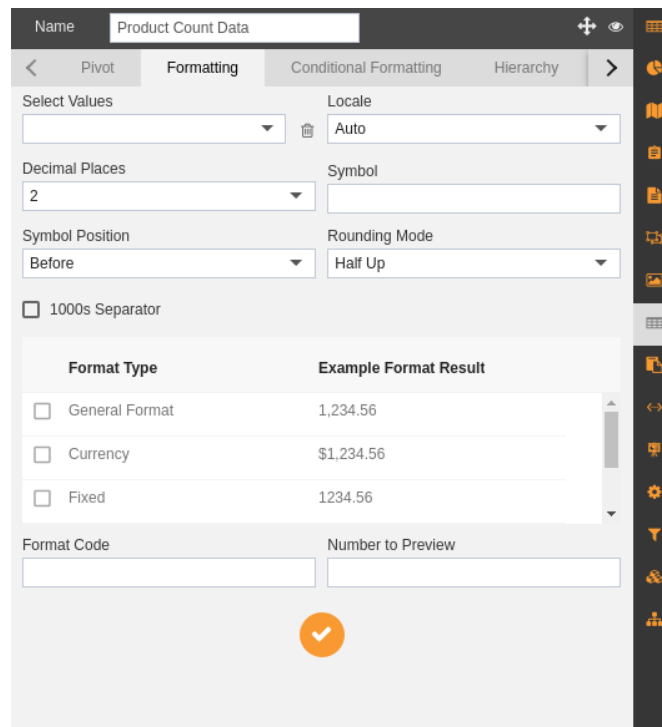
7. You can select to show rows and columns total as shown in the figure above.
8. The following pivot widget will be created due to these changes:-

Product Count Data

	country	Denmark	Germany	Italy	Norway	Philippines	Spain	USA	Total Count of country
productLine		Count of country	Count of country	Count of country	Count of country	Count of country	Count of country	Count of country	
Classic Cars		3			3	11	7	4	28
Motorcycles						5		8	13
Planes				12					12
Ships		7		2					9
Trains		1					2		3
Trucks and Buses					7		4		11
Vintage Cars		4	4	4	6			6	24
Total		15	4	18	16	16	13	18	100

Formatting

1. Click on on your current pivot widget in order to perform formatting.
2. Go to **Formatting** tab and the following screen will be displayed:-
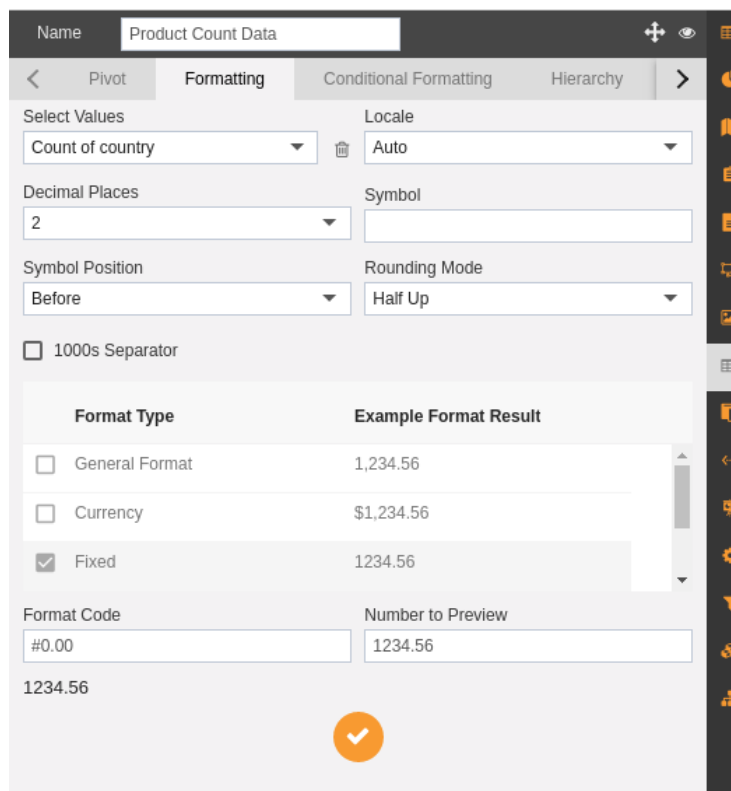
3. Now perform following formatting changes:-

4. Select Values as Count of the country from the dropdown.
5. Select Locale as Auto, decimal places 2, rounding mode half up.
6. Check the 1000s separator check box.
7. Keep the Format type as Fixed.
8. After formatting the pivot appears as follows:-

Product Count Data

productLine	country	Denmark	Germany	Italy	Norway	Philippines	Spain	USA	Total Count of country
		Count of country	Count of country	Count of country	Count of country	Count of country	Count of country	Count of country	
Classic Cars		3.00			3.00	11.00	7.00	4.00	28.00
Motorcycles						5.00		8.00	13.00
Planes				12.00					12.00
Ships		7.00		2.00					9.00
Trains		1.00					2.00		3.00
Trucks and Buses					7.00		4.00		11.00
Vintage Cars		4.00	4.00	4.00	6.00			6.00	24.00
Total		15.00	4.00	18.00	16.00	16.00	13.00	18.00	100.00

Conditional Formatting

1. Click on ![edit icon] on your current pivot widget in order to perform the conditional formatting.
2. Go to **Conditional Formatting** tab and the following screen will be displayed:-
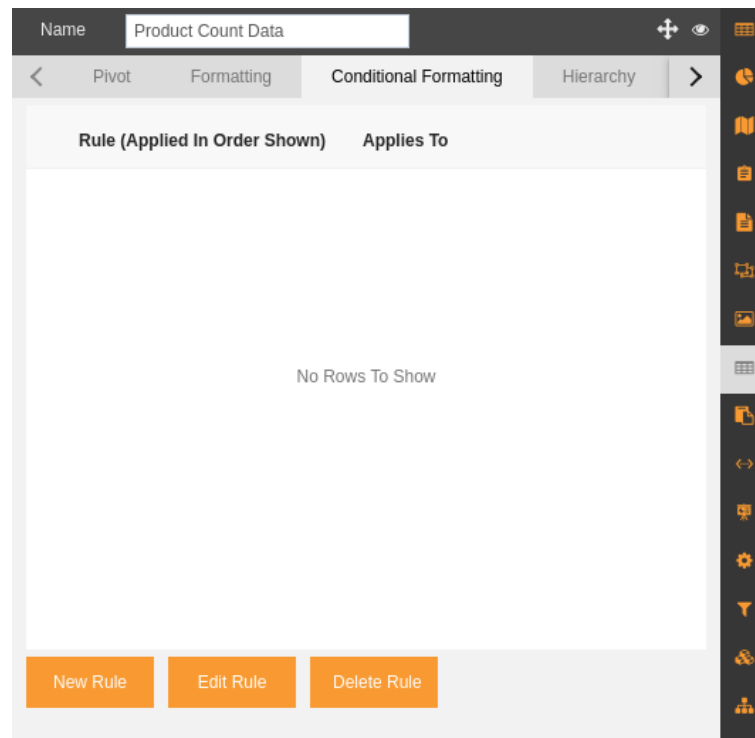
3. In order to add new rule to the pivot widget click on the New Rule button as shown in the figure above.
4. After that perform the formatting as shown in the figure:-

5. Drag and drop Count of country in Selected Column.
6. Select Rule Type as "**Format cells all based on their values**".
7. Format Type 2-Color Scale, Minimum type Lowest Value and Maximum type Highest Value.
8. Finally click on the ✔ button as shown in the figure.
9. Now your pivot widget looks as below:-

Product Count Data								
country	Denmark	Germany	Italy	Norway	Philippines	Spain	USA	Total Count of country
productLine	Count of country	Count of country	Count of country	Count of country	Count of country	Count of country	Count of country	
Classic Cars	3.00			3.00	11.00	7.00	4.00	28.00
Motorcycles					5.00		8.00	13.00
Planes			12.00					12.00
Ships	7.00		2.00					9.00
Trains	1.00					2.00		3.00
Trucks and Buses				7.00		4.00		11.00
Vintage Cars	4.00	4.00	4.00	6.00			6.00	24.00
Total	15.00	4.00	18.00	16.00	16.00	13.00	18.00	100.00

10. You can edit your conditional formatting rule by selecting the rule and clicking on Edit Rule button.
11. Finally, in order to delete the rule you can select the rule and click on Delete Rule button.

Hierarchy

Settings
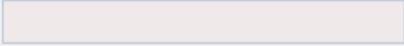
1. Click on ✐ on your current pivot widget in order to change settings of the pivot.
2. You can change the settings of your pivot widget as follows:-
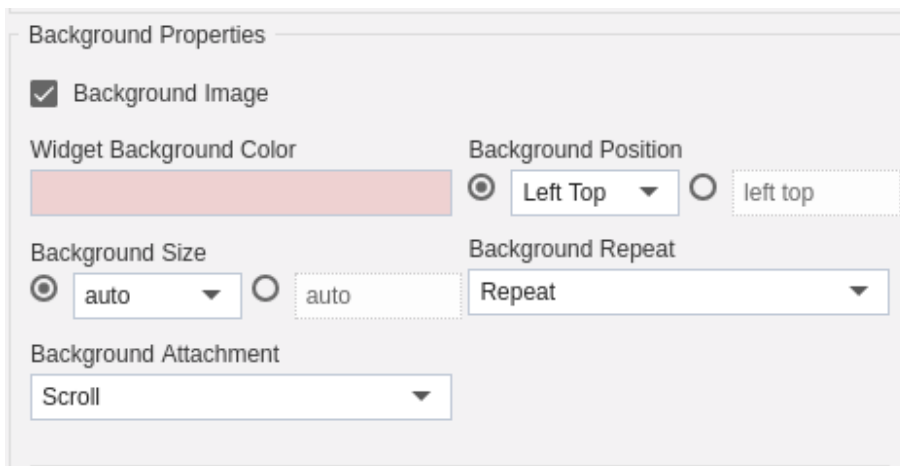
3. Here in the above figure, widget properties have been set.
4. The widget will be refreshed after every single minute.
5. You can set the Panel Background Colour, Maximize widget bg colour, the widget icon colour, box shadow colour and other similar properties related to the widget as shown above.
6. You can also change the background image as shown below:-

7. You can set the Title properties as shown below:-

8. Here you can set the position of title, title colour, font size, font style, font family and font weight.
9. You can set the Border to your map as follows:-

10. Here we have set Border Type as Solid, width 0.5, colour grey, top left radius 0.5, top right radius 0.5, bottom left radius 0.5 and bottom right radius 0.5.

11. In a similar manner, you can set Sub Title properties as shown above.
12. You can also hide the data from certain devices, show filter value or wait for the filter by checking the checkboxes shown above (Filter will be discussed in detail in later sections).
13. Now Click on 🔒 button in order to save the map.
14. Finally, your map will be displayed as follows:-

productLine	country	Denmark	Germany	Italy	Norway	Philippines	Spain	USA	Total Count of country
		Count of country	Count of country	Count of country	Count of country	Count of country	Count of country	Count of country	
Classic Cars		3.00			3.00	11.00	7.00	4.00	28.00
Motorcycles						5.00		8.00	13.00
Planes				12.00					12.00
Ships		7.00		2.00					9.00
Trains		1.00					2.00		3.00
Trucks and Buses					7.00		4.00		11.00
Vintage Cars		4.00	4.00	4.00	6.00			6.00	24.00
Total		15.00	4.00	18.00	16.00	16.00	13.00	18.00	100.00

Refresh

1. 1

2. Click on Refresh and your pivot will be refreshed.

Copy

8. In order to copy your pivot click on the side elapses ▮ in your pivot widget.
9. This will open the following menu:-
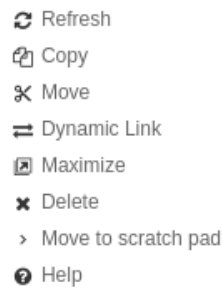
- ↻ Refresh
- ⎘ Copy
- ✂ Move
- ⇄ Dynamic Link
- ⬀ Maximize
- ✖ Delete
- › Move to scratch pad
- ❷ Help

Click on copy which will open the following dialog box:-

Copy	❷ ✖
Name	
Copy_Product Count Data	
Tabs	
Sales Data ▾	
[Create Tab] [Copy] [Cancel]	
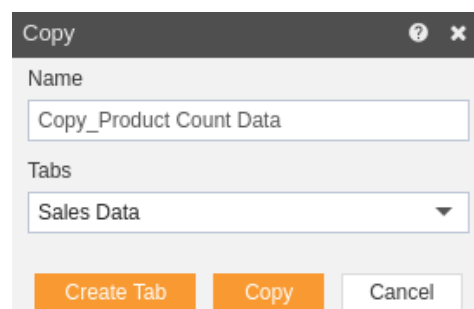
4. Here you can specify the name you want to give while copying the pivot.
5. The default tab is Sales Data. You can create a new tab from here by clicking on Create Tab .
6. This opens the following dialog box:-

Create Tab	❷ ✖
Name	
copy sales data	
[Create File] [Cancel]	

7. Click on Create File in order to save the tab.
8. Now select copy_product from dropdown as follows:-

Copy	❷ ✖
Name	
Copy_Product Count Data	
Tabs	
copy sales data ▾	
[Create Tab] [Copy] [Cancel]	
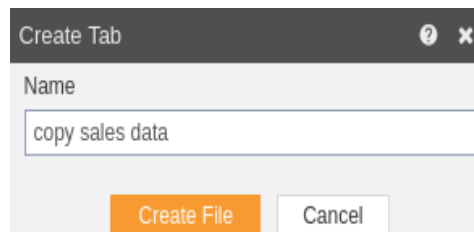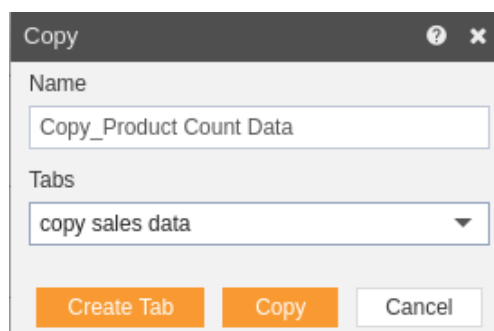
9. Click on Copy to copy the pivot widget.
10. You can see a new tab copy sales data has been created where our pivot is copied.

Copy_Product Count Data

productLine	country	Denmark Count of country	Germany Count of country	Italy Count of country	Norway Count of country	Philippines Count of country	Spain Count of country	USA Count of country	Total Count of country
Classic Cars		3.00			3.00	11.00	7.00	4.00	28.00
Motorcycles						5.00		8.00	13.00
Planes				12.00					12.00
Ships		7.00		2.00					9.00
Trains		1.00					2.00		3.00
Trucks and Buses					7.00		4.00		11.00
Vintage Cars		4.00	4.00	4.00	6.00			6.00	24.00
	Total	15.00	4.00	18.00	16.00	16.00	13.00	18.00	100.00

Move

1. In order to move your pivot click on the side elapses ▊ in your map widget.
2. This will open the following menu:-
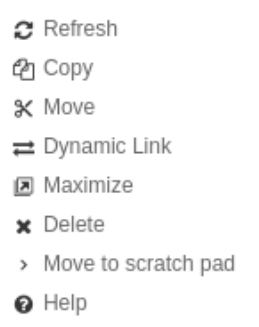
3. Click on copy which will open the following dialog box:-
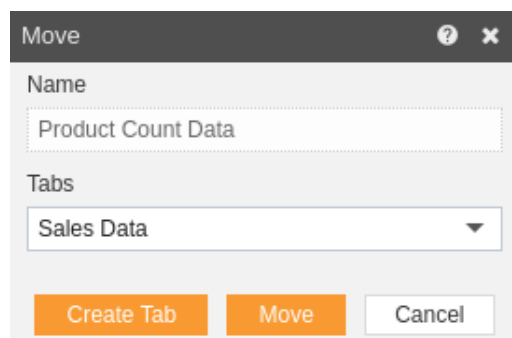
4. Here you can specify the name you want to give while moving the pivot.
5. The default tab is Product Count Data. You can create a new tab from here by clicking on Create Tab .
6. This opens the following dialog box:-
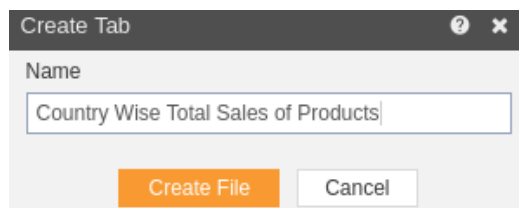
7. Click on Create File in order to save the tab.
8. Now select Sales of Products Across India from dropdown as follows:-
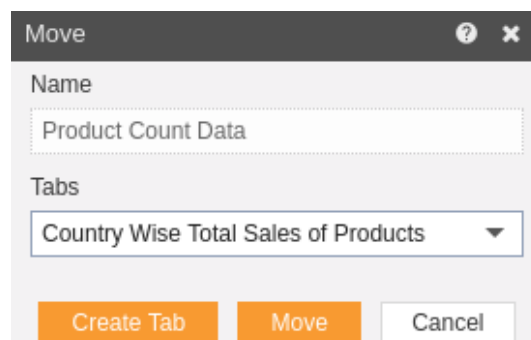
9. Click on Move to copy the widget.
10. You can see a new tab Country Wise Sales of Products has been created where our widget is moved.
11. As the pivot widget is removed from Sales Data it will appear blank to the user.

productLine / country	Denmark Count of country	Germany Count of country	Italy Count of country	Norway Count of country	Philippines Count of country	Spain Count of country	USA Count of country	Total Count of country
Classic Cars	3.00			3.00	11.00	7.00	4.00	28.00
Motorcycles					5.00		8.00	13.00
Planes			12.00					12.00
Ships	7.00		2.00					9.00
Trains	1.00					2.00		3.00
Trucks and Buses				7.00		4.00		11.00
Vintage Cars	4.00	4.00	4.00	6.00			6.00	24.00
Total	15.00	4.00	18.00	16.00	16.00	13.00	18.00	100.00

Dynamic Link

Maximize

- In order to maximize your pivot click on the side elapses 🔳 in your pivot widget.
- This will open the following menu:-
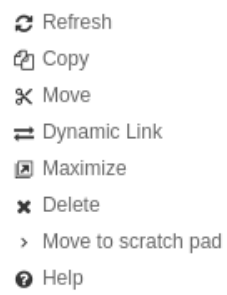
- Click on Maximize and your pivot will be maximized.

Delete

- In order to delete your pivot click on the side elapses ⬛ in your pivot widget.
- This will open the following menu:-

         ↻ Refresh
         ⧉ Copy
         ✂ Move
         ⇌ Dynamic Link
         ↗ Maximize
         ✖ Delete
         › Move to scratch pad
         ❷ Help
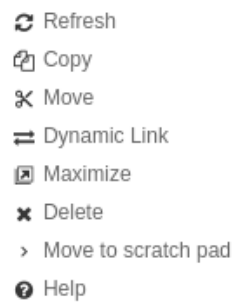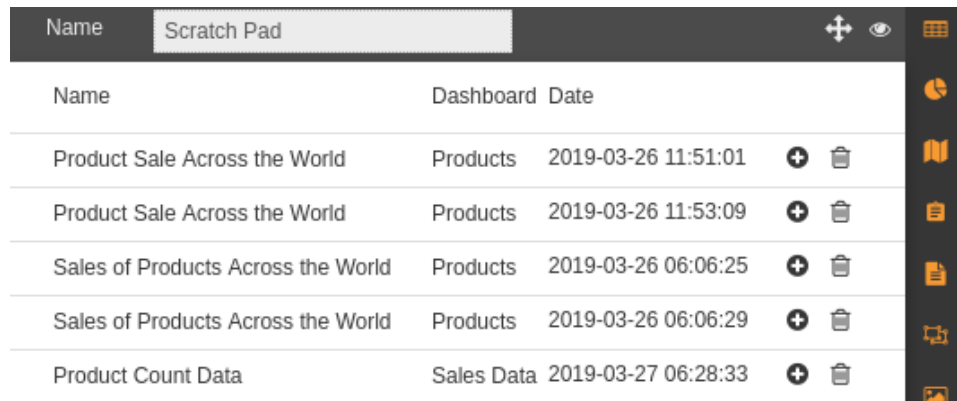
- Click on Delete and your pivot will be deleted.

Move to scratch pad

- In order to move your pivot to the scratch pad click on the side elapses ▯ in your pivot widget.
- This will open the following menu:-

     🔄 Refresh
     📋 Copy
     ✂ Move
     ⇌ Dynamic Link
     ↗ Maximize
     ✖ Delete
     › Move to scratch pad
     ❓ Help
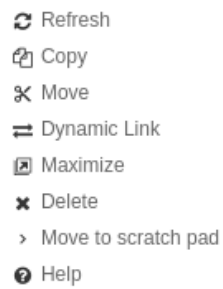
- Click on Move to scratch pad and your map will be moved to the scratch pad as follows:-

Name	Scratch Pad		
Name	**Dashboard**	**Date**	
Product Sale Across the World	Products	2019-03-26 11:51:01	➕ 🗑
Product Sale Across the World	Products	2019-03-26 11:53:09	➕ 🗑
Sales of Products Across the World	Products	2019-03-26 06:06:25	➕ 🗑
Sales of Products Across the World	Products	2019-03-26 06:06:29	➕ 🗑
Product Count Data	Sales Data	2019-03-27 06:28:33	➕ 🗑

- The detailed description regarding scratch pad will be provided in scratch pad tutorial.

Help

- In order to access AIS help document related to pivot widget click on the side elapses ▌ in your pivot widget.
- This will open the following menu:-
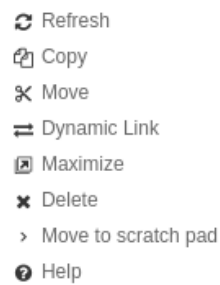
- Click on Help and you will be redirected to AIS help documents.

Filter

- Dashboard Filters enable users to create filters on the fly, which can then be used to filter all the widget in the dashboard using single click based on the value passed in the filter box. Dashboard Filters can be used to filter widgets available in the open dashboard which can be spread across to all the tabs.

- AIS enables users to create various types of filters such as:
    1. Text box filter
    2. List (Drop Down filter)
    3. Multi-select
    4. Date
    5. Radio Buttons
    6. Check box and much more

- **A Filter** enable users, to create the filter which can then be used to filter the existing dashboard, multiple tabs and multiple widgets.

- To Create New **Filter,** follow the steps below:
1. Click on ⦂⦂⦂ **Component** icon from the top right corner menu, a list of the available component will open up as follows:

2. Click on ![filter icon] Component from the list of component into the dashboard, a configuration box would open as follows:
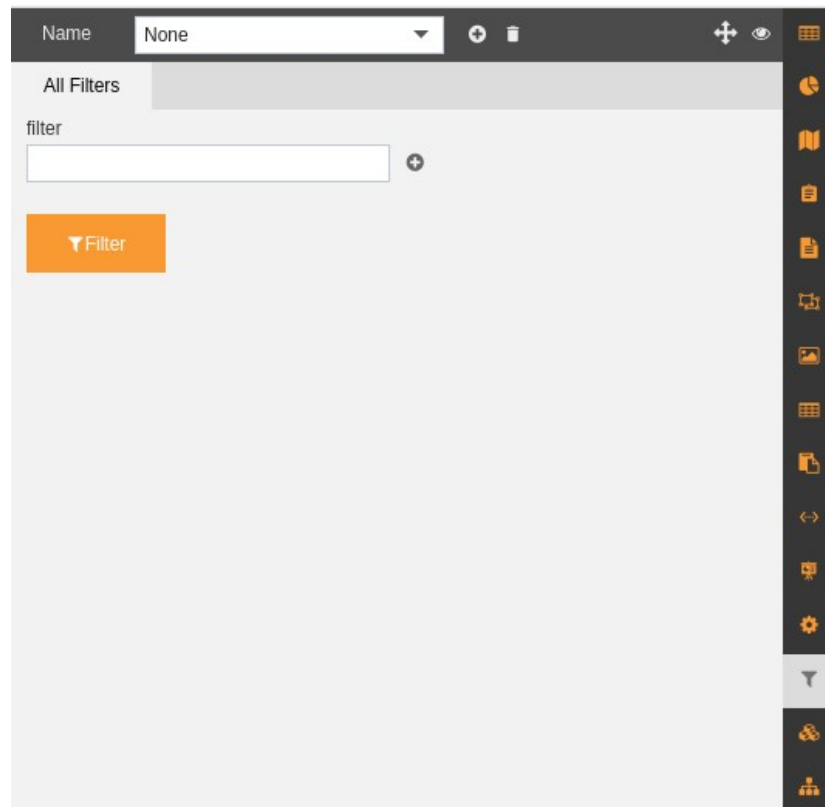
3. Click on ![plus icon] besides the Name drop down menu in order to add a new filter or you can select the existing filter from the drop down menu as follows:-
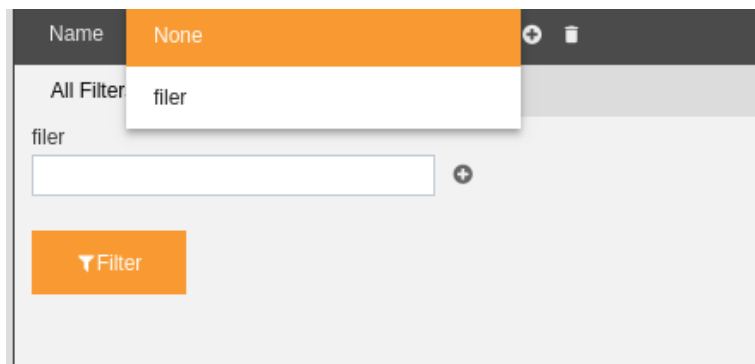
4. We will create a new filter for textbox as follows:-
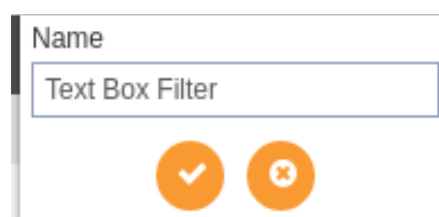
5. Click on ![save icon] button in order to save a filter which will appear on your screen as follows:-
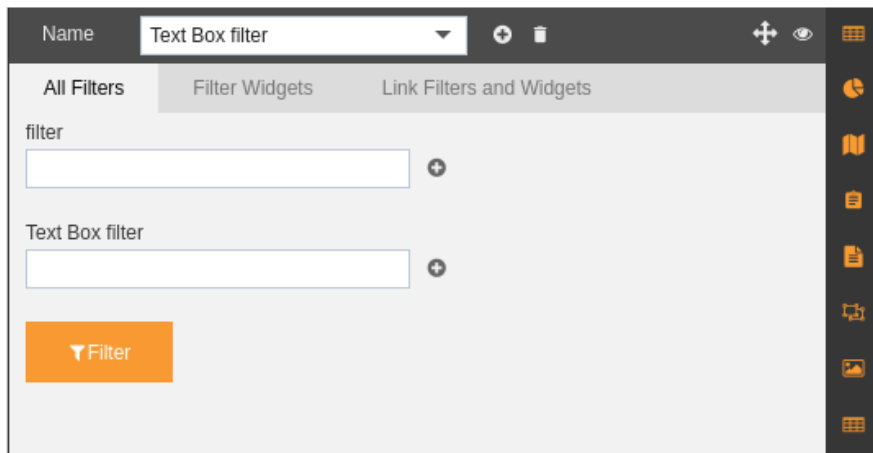
6. As you can see our filter is added to the filter list.
7. The filter widget has the following sub-tabs:-
    o All Filters
    o Filter Widgets
    o Link Filters and Widgets
8. Let us understand each one of them in detail in the following sections.

All Filters

1. The All Filters Tab displays the list of all the existing filters in the AIS application as follows:-
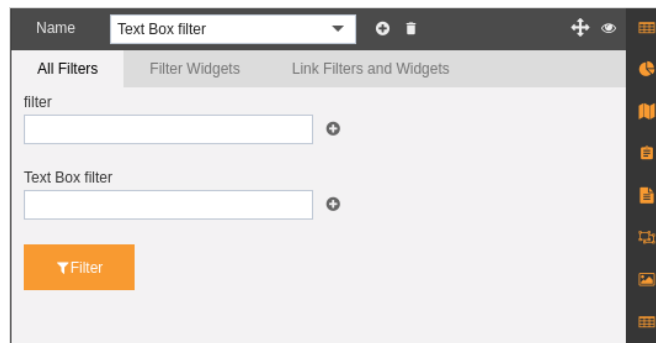
2. Here we have two filters "filter" and "Text Box filter".
3. As we have to use Text Box filter for understanding, delete the other filter.
4. For this select the filter "**filter**" from the drop-down menu and press on delete button 🗑 which will delete the filter and following screen will be displayed:-
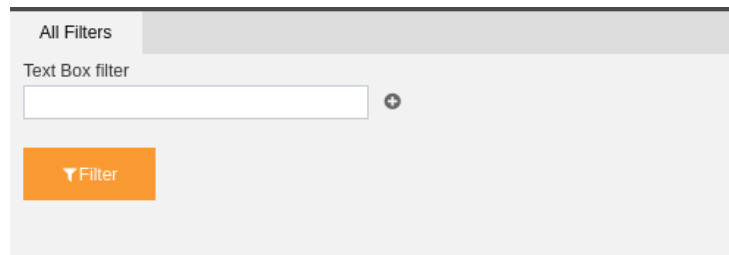
In order to add the filter to the dashboard click on ⊕ besides the Text Box filter and the filter will be added to the dashboard as follows:-
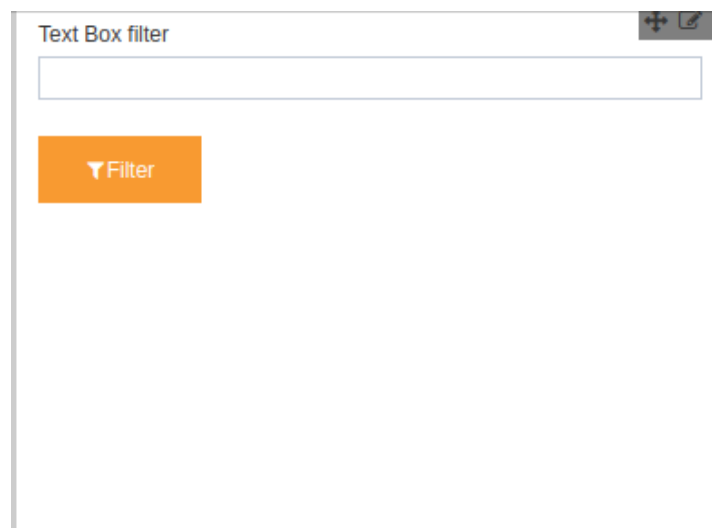
Filter Widgets

1. Click on ✎ on your current filter widget in order to see the filter widgets.
2. Select Text Box filter from the Name drop-down if not already selected.
3. Go to **Filter Widgets** tab and the following screen will be displayed:-
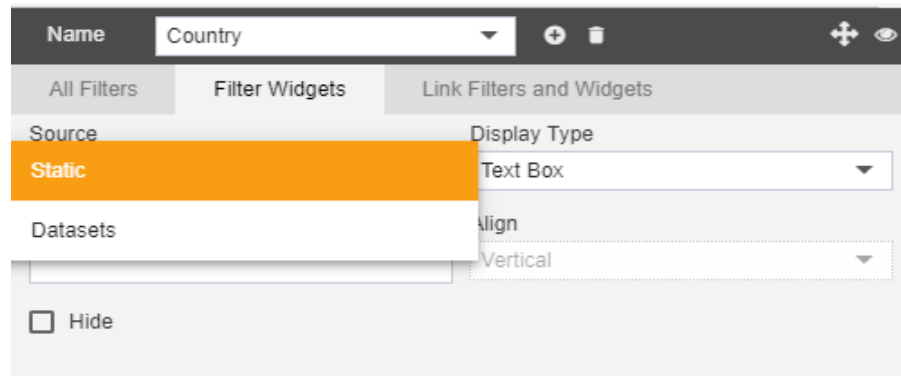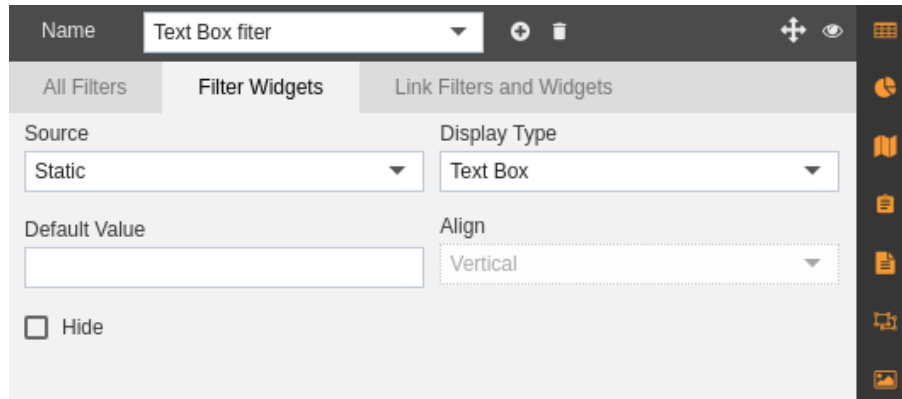
- In **Filter Widgets** Tab, Provide the desired **Name** of the Filter. The **Height** and **Width** of the Filter are predefined and can be updated.
- **Display Type** allows users to create the type of the filter using the drop-down menu box i.e. Text Box, List Box, Multi-select, Date, Radio, Checkbox, etc.
- If selected **Display Type** is **Radio** or **Checkbox**, select **Align** from the drop-down menu to **Horizontal** or **Vertical** as desired.
- Select one of the **Source** to create a widget from,
- **Static**
- **Datasets**
- **Parameters**

1. Select dataset from the **Available datasets** box select single dataset and single column as a source for your filter, Selected Column will appear as follow: This column values will be used to filter the links widgets.

- You can provide a default value if you want.
- To hide a filter you can select hide checkbox.
- To show All-None option in select box.

2. Go to Link Filters and Widgets Tab to link other widgets, you will get list of the widgets in the **Available Columns**, you can link as many widgets you like.
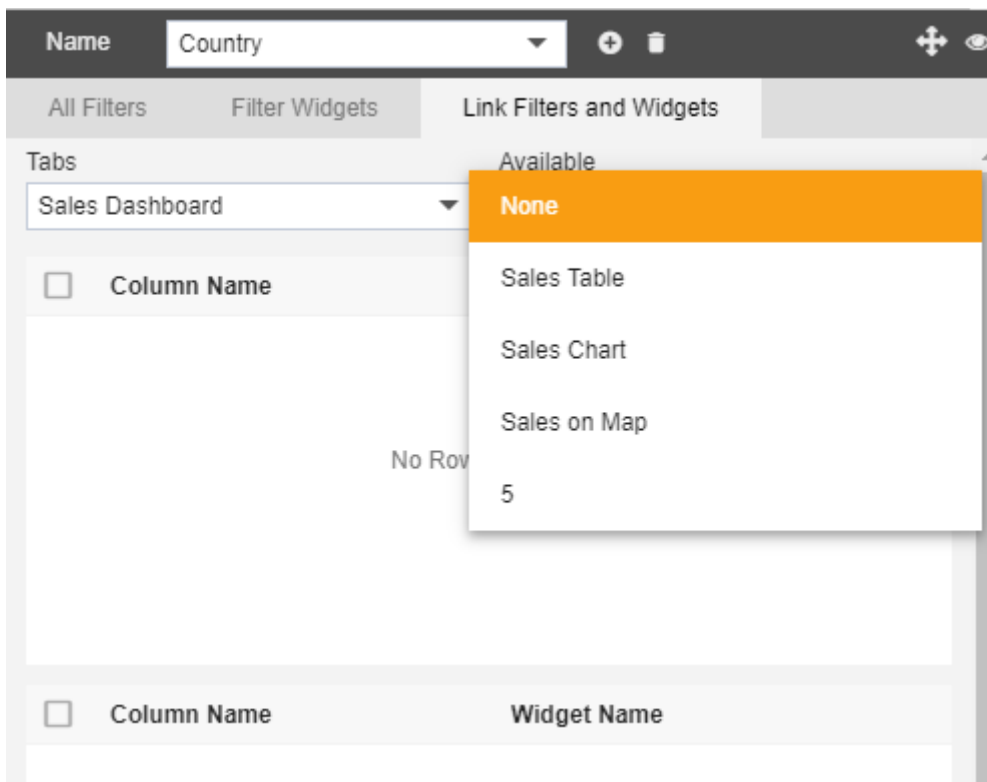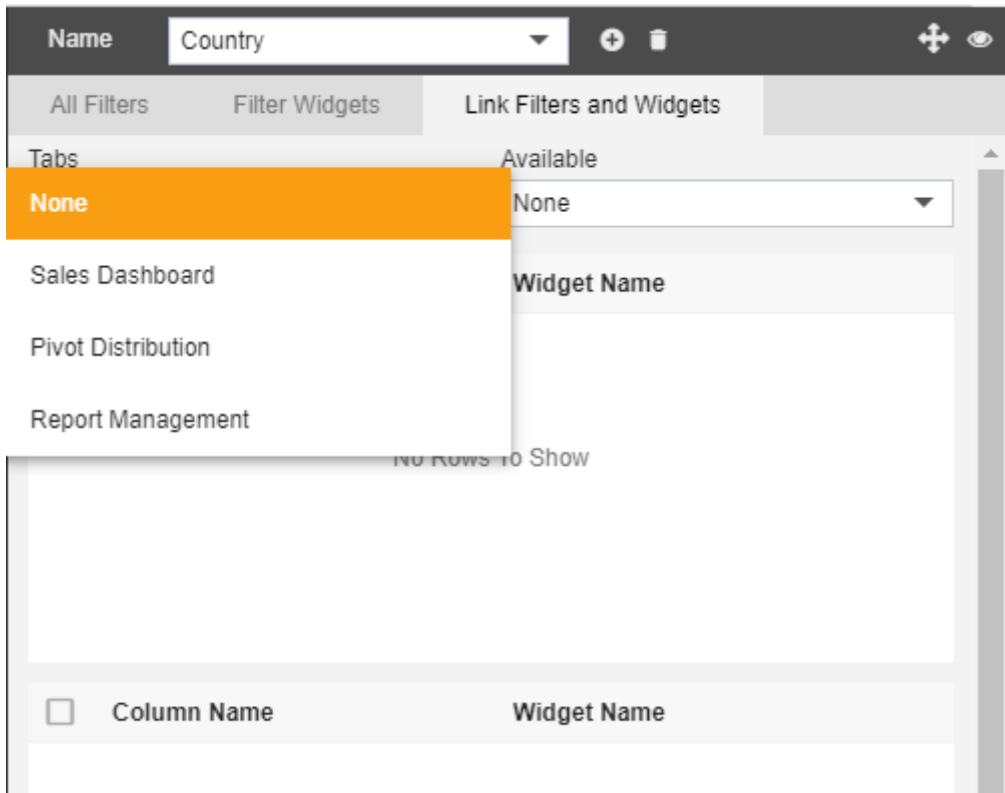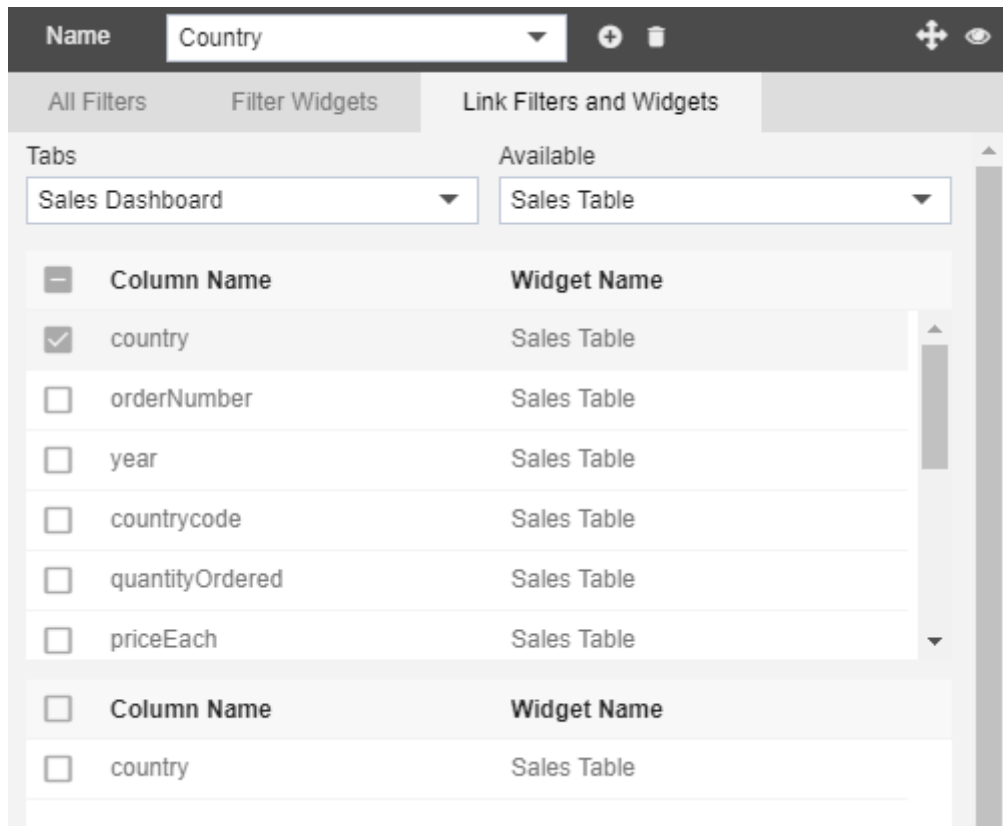
3. Select appropriate values as desired as shown above.

4. Click on [icon] to create Filter.

Tips:
1. Multiple filters are possible in Active Intelligence Dashboard, each filter can then be linked with multiple widgets and can be used to filter with different values.
2. You can only select one source widgets from which the other widgets will get a filter.
3. Widgets in a different tab within the same dashboard can also be filtered.
4. Users can create Cascading parameters as well

Image & Text

- Image & Text provides creative visualization by adding your images and text using the HTML editor in dashboard.
- To Add an Image & Text Widget in a dashboard, follow the steps below:
  1. Click on ⠿ Component icon from the top right corner menu, a list of the available component will open up as follows:

  2. Click on 🖼 Component from the list of component into the dashboard, a configuration box will open as follows:

3. If user wants to add new image then click on ⬆ button from the bottom.
4. Select Image which you want to add into the dashboard and click open.
5. Image will be added successfully to the dashboard.

Settings

- A user can edit the Image and text properties with the help of the settings tab.
- Settings tab includes widget properties, background properties, title properties, border properties, and subtitle properties.
- There are some additional features like show filter value, hide in desktop, hide in mobile, wait for filter and hide in a tablet.
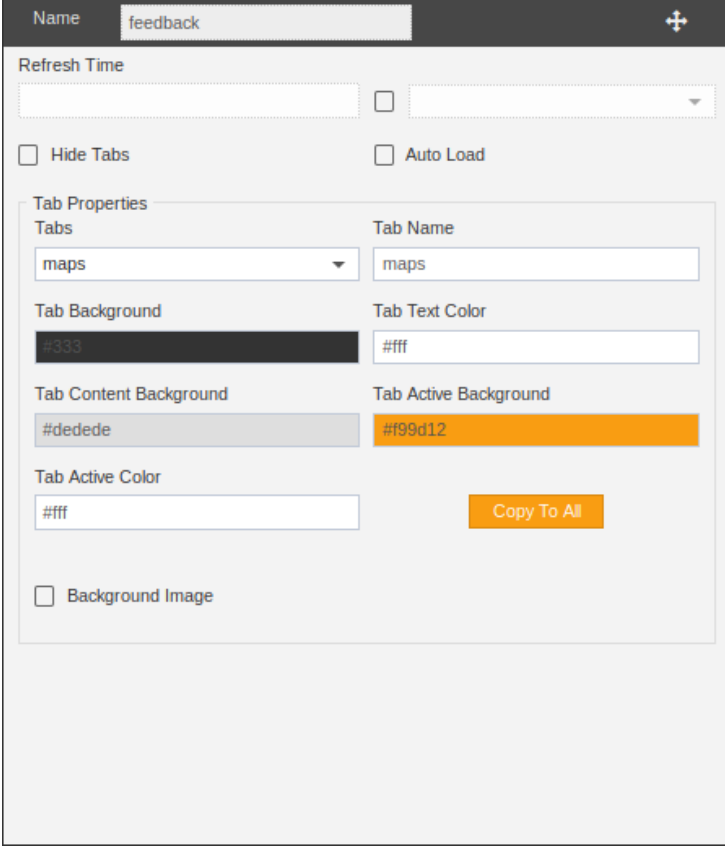
Custom Visualization

- Custom Visualization enable users to add custom codes i.e. html, JavaScript to write their own business logic to create custom widgets also users can use virtually add any charts or maps libraries i.e. High Charts, D3js, Google maps etc. to create custom widgets.
- NOTE: Please check the license condition, users must read and agree to the third party licenses before using them, AIS does not take any responsibility for any AIS customers for not following licensing terms for any third party tools and users are fully responsible for third party licenses and using third party library/tool by fully complying with the terms attached.
- To Add a Custom Visualization Widget in the dashboard, follow the steps below:

  1. Click on ⊞ Component icon from the top right corner menu, a list of the available component will open up as follows:

Dashboard Settings

- Dashboard Settings allows a user to change the settings of the Dashboard from the list of Dashboards.
- For Dashboard Settings, follow the steps below:

    1. In the Edit mode click on ⚙ icon at top left corner of the dashboard, below dialog box will appear.

    2. There are different option to customize dashboard below are a few options.

        - In Name Option, dashboard name can be changed as desired.
        - In Refresh Option, dashboard would be refreshed every time at selected interval.
        - In the Background Color Option, the dashboard background color can be changed as desired.
        - In Hide Tabs Option, dashboard tabs can be hidden.
        - In Auto Load Option, dashboard can be loaded automatically.
        - In Background Image Option, background image can be added to dashboard.

    3. Click on Submit button to see changes.

Documents

Documents tab contain the reports and common files, it works just like your window folders where you can create nested folders and upload the files and different reports at various levels.

Documents tab can be accessed from the main menu. Document and other sections under the document tab are only visible if the appropriate privileges have been assigned to the logged in user, please contact your administrator if you facing difficulties accessing the sections under the Documents tab.

Documents tab contain following sub sections:
- Reports
- Merge Reports
- Adhoc
- Shared Resources
- Quick Run
- Mappings
- Dynamic Messages

Report

Reports are the sub-section under the Documents Section of the AIV application. The Reports section can be accessed by clicking on Reports to open in the same window or to open in a new window simply click on new window Icon ⬀ next to the Reports tab. The primary purpose of the Reports section to perform different functionalities related to reports such as:

1. Upload
2. Create Folder
3. Copy
4. Move
5. Delete
6. Share
7. Schedule Reports
8. Unarchive
9. Unpurged
10. Audit
11. Version
12. Embed
13. Download
14. Property

Upload Reports

The user can upload reports by clicking on the upload icon ⬆ Upload on the toolbar located at the bottom of the reports page.

On clicking the icon, the following screen will be displayed

In the Files section as shown in the figure above, select the upload icon in order to upload your documents from your computer.

- If the report already exists on the AIV application, the user has an option to replace the default report or to create a new report using the version option as depicted above.
- Furthermore, the user can also provide an optional description for reference, in the description text area shown here.

- There is also an option to hide the visibility to certain users using the privileges tab as shown in the figure below:

- In case of working with any new version of the report, you can assign the default version share privileges by checking the checkbox. For instance, if there are three versions of the same report and a new version is to be created of that report, then default share privileges can be applied to that report.
- The user can select other users who can share the report from the list of available users or search them in the search user bar.
- In a similar manner, the user can apply privileges to different user roles as follows:-
- Just as in case of users, the user can assign default share privileges to different user roles or can select the roles from the Available list of roles.
- The user can also search for roles in the Search Role bar.

- Visibility is used to mention who all can view the report and is of following three types:-
  1. **Private:-** It means only the current user / actual owner can view the file.
  2. **Internal:-** It means all the users within the organization can view the file.
  3. **Public:-** It means anyone can view the file.

- The user can select the visibility from the dropdown menu as shown above.
- In case of any further help, the user can click on the 🔳 icon to access the AIV help documents.
- Finally, in order to upload the report, click on the upload button.
- If the user is not satisfied and wants to cancel the upload request, he can do this by clicking on the cancel button next to upload or by clicking on ⬛ button next to the 🔳 icon.

Create Folder

- There are two ways in which a user can create a new folder in the AIV application.
  1. By clicking on the create icon 📁Create next to the upload icon at the bottommost toolbar.
  2. By right clicking on any existing file or folder on the reports page as follows:-

3. On clicking on create folder, following popup will be opened:-
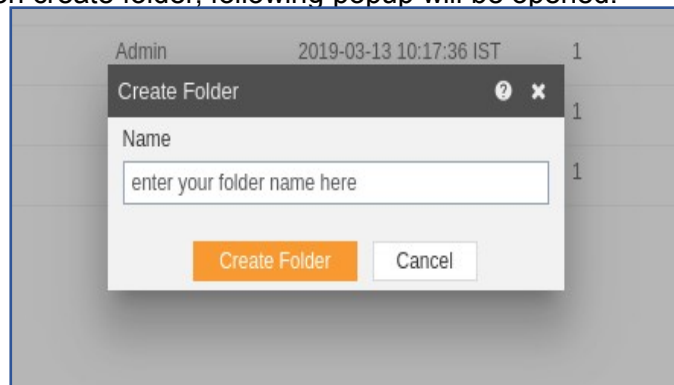
4. In case of any further help, the user can click on the 🅐 icon to access the AIV help documents.
5. Enter the name you want to give to your folder in the text area and click on create folder.
6. If the user is not satisfied and wants to cancel the create request, he can do this by clicking on the cancel button next to upload or by clicking on 🅧 button next to the 🅐 icon.

Open Folder

- There are two ways in which a user can open a folders in the AIV application:-
  1. On right clicking any of the existing folder, the following menu will be displayed. To open folder, click on Open Folder.
  2. By double-clicking the folder which you desire to open.

Copy

- There are two ways in which a user can copy a design in the AIV application:-
  1. By clicking on the copy icon 🅒 Copy located at the bottom most toolbar.
  2. By right clicking the report you want to copy. We will use the **Portrait View** design in this tutorial for the purpose of understanding.
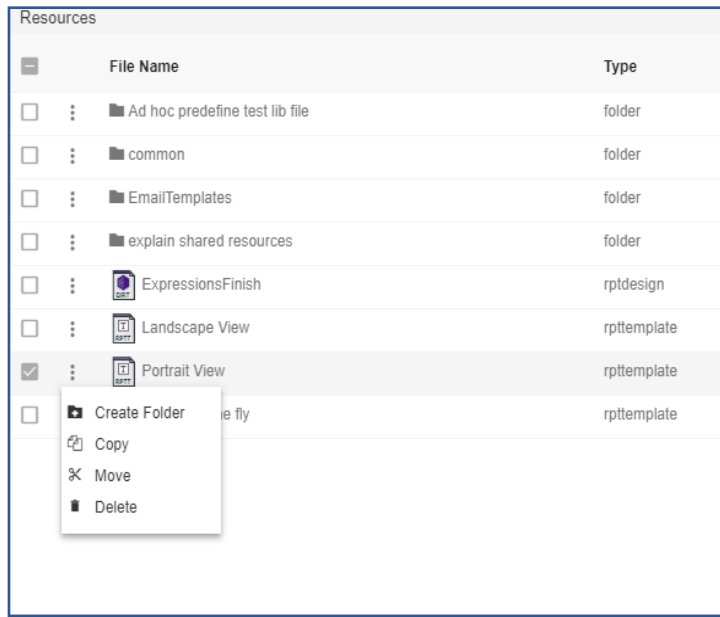
- Now perform the following steps in order to copy the design Portrait View:-
  1. Click on Copy using one of the methods mentioned above which will open the following popup.
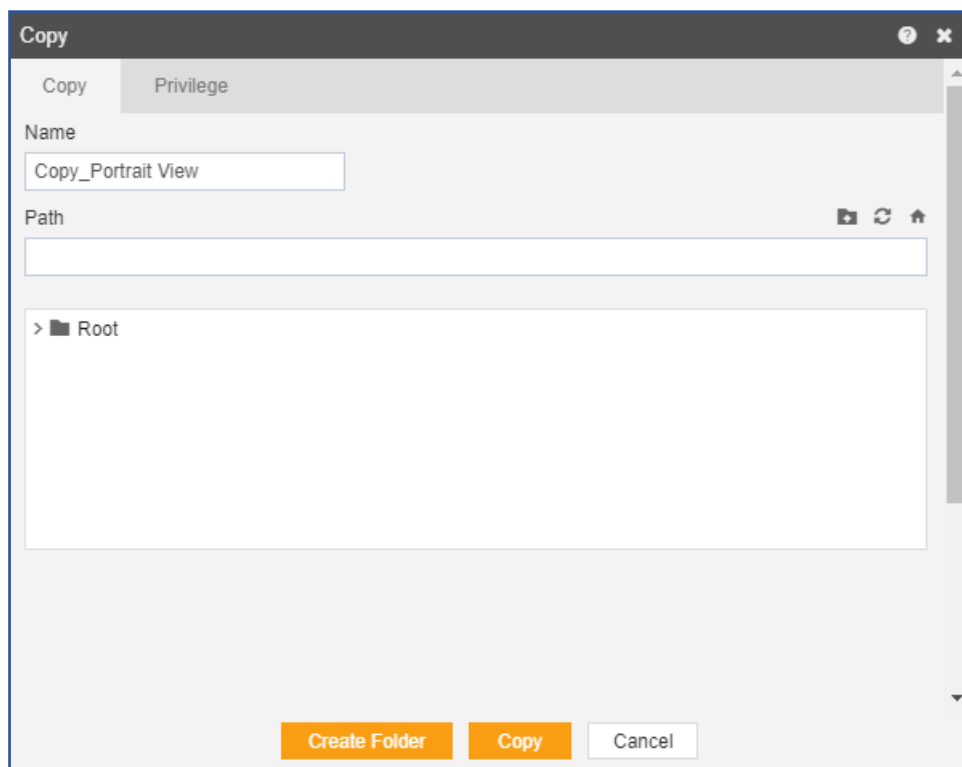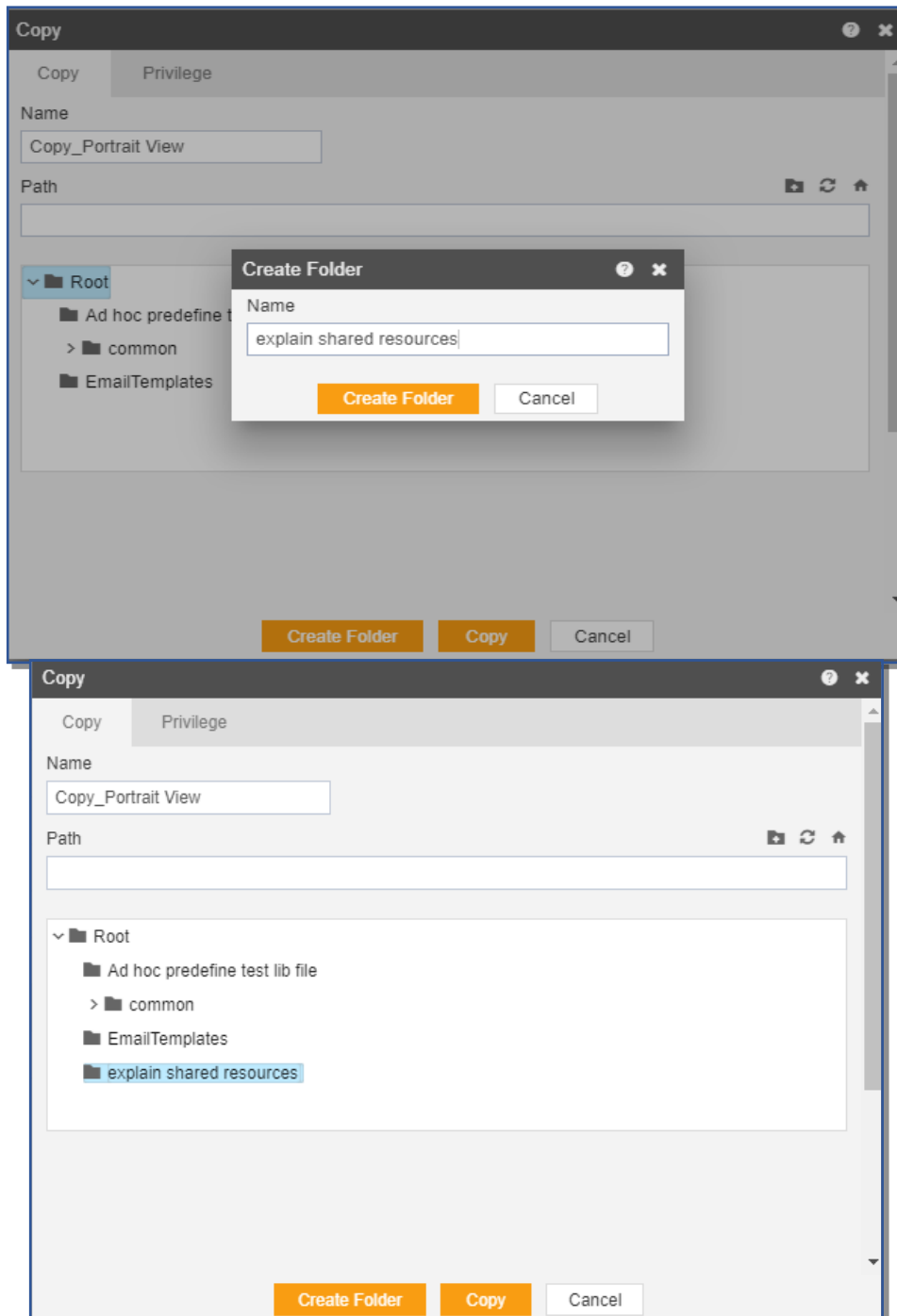
2. The default name will be Copy_Portrait View. You can provide your own name while copying a design.
3. In order to provide copy destination, you can select any of the folders present in the popup or can create a new folder by selecting the folder where new folder must be created and clicking on Create Folder as follows:-
4. Here we have created a folder named explain shared resources within root where we will copy our Portrait View report.
5. Select explain shared resources from the list shown below:-
6. In order to assign privileges to the design, click on the privileges tab next to the copy tab. By default, Copy current privileges and visibility checkbox will be checked which will retain the same privileges and visibility of the original design in the copied version.

7. If you want to assign privileges, uncheck Copy current privileges and visibility checkbox.
8. The user can select other users with whom the copied design will shared from the list of available users or search them in the search user bar.

9. In a similar manner, the user can apply privileges to different user roles as follows:-
10. The user can also search for roles in the Search Role bar.
11. Visibility is used to mention who all can view the report and is of following three types:-
    o **Private:-** It means only the current user can view the file.
    o **Internal:-** It means all the users within the organization can view the file.
    o **Public:-** It means anyone can view the file.
12. The user can select the visibility from the dropdown menu as shown above.
13. In case of any further help, the user can click on the ⍰ icon to access the AIV help documents.
14. Finally, in order to copy the design, click on the Copy button.
15. If the user is not satisfied and wants to cancel the copy request, he can do this by clicking on cancel button next to copy or by clicking on ✖ button next to the ⍰ icon.
16. You can see the Copy_Potrait View appears in the explain folder by opening it.

In a similar manner, you can also perform the copy operation on the folders selecting the folder you desire to copy and choosing the copy icon from the toolbar, or by right-clicking the folder and selecting the copy option from the elapses shown.

Move

- There are two ways in which a user can move a report in the AIV application:-
    1. By clicking on the move icon ✕ Move located at the bottom most toolbar.
    2. By right-clicking the report you want to move. We will use the **Employee List** report in this tutorial for the purpose of understanding.
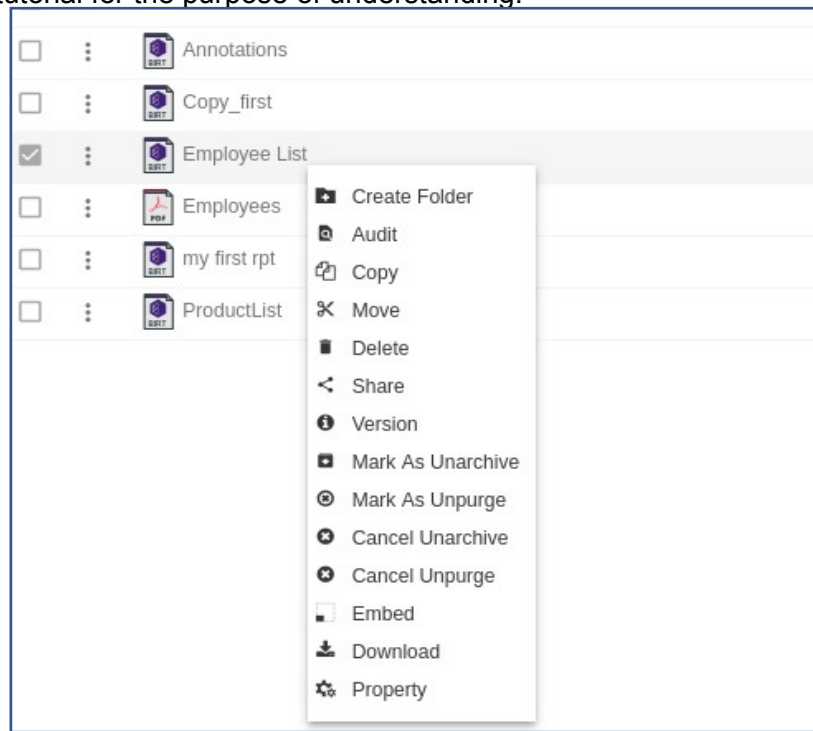
- Now perform the following steps in order to move the report Employee List:-
    1. Click on Move using one of the methods mentioned above which will open the following popup.
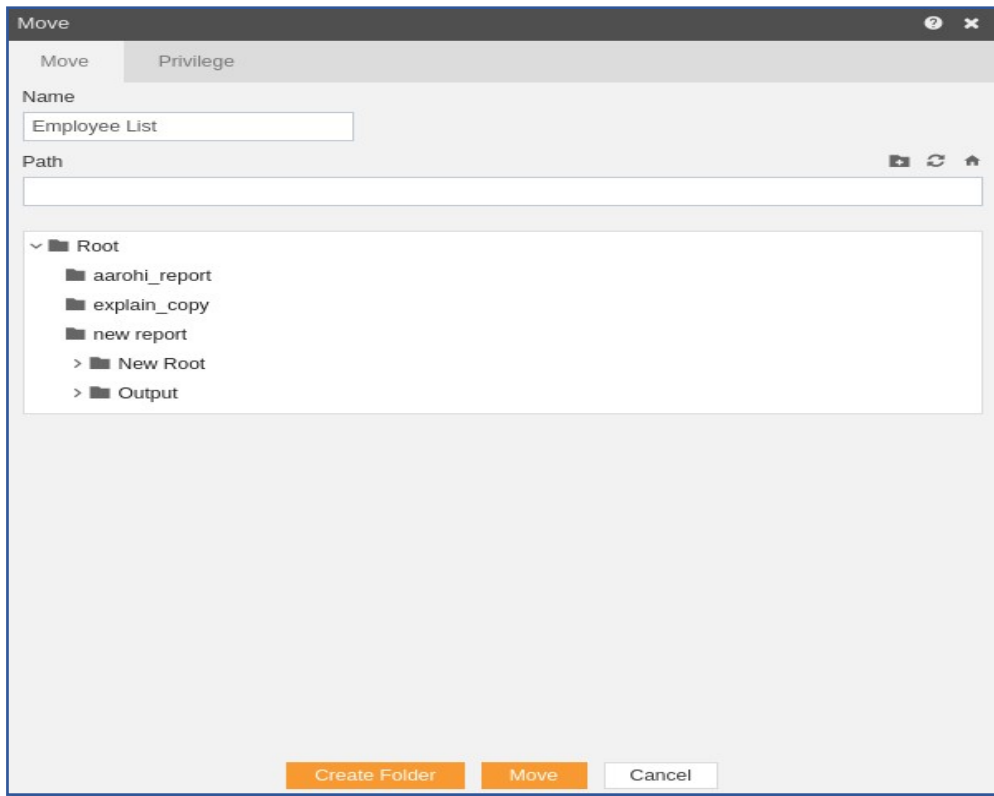
2. The default name will be Employee List. You can provide your own name while moving a report.
3. In order to provide move destination, you can select any of the folders present in the popup or can create a new folder by selecting the folder where new folder must be created and clicking on Create Folder as follows:-
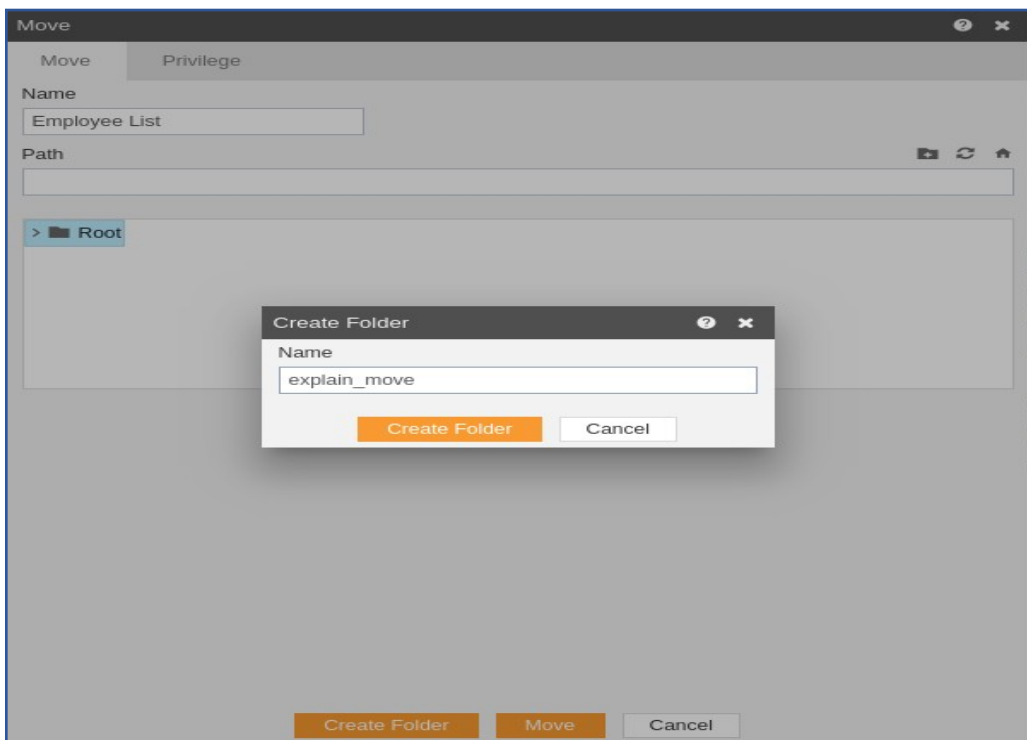
4. Here we have created a folder named explain_move within root where we will move our Employee List report.
5. Select explain_move from the list shown below:-
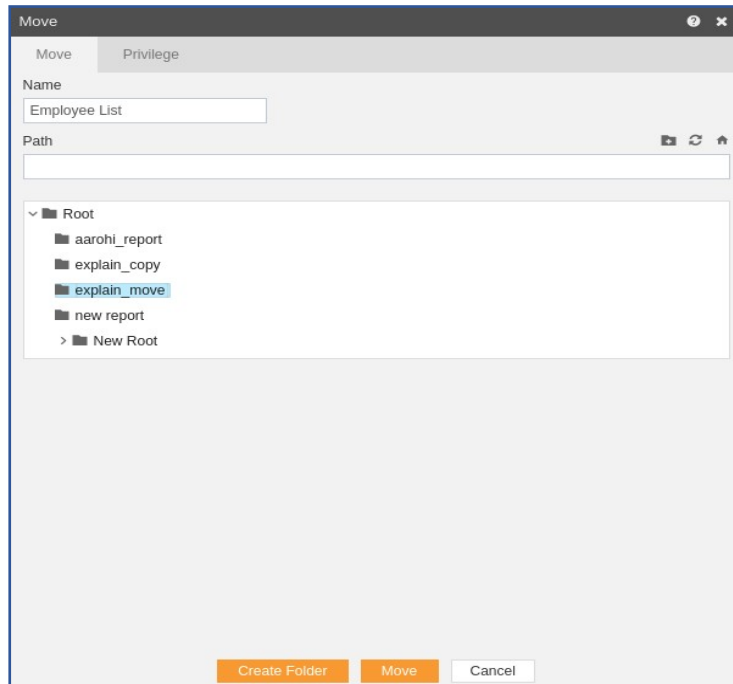
6. In order to assign privileges to the report, click on the privileges tab next to the move tab. By default, Copy current privileges and visibility checkbox will be checked which will retain the same privileges and visibility of the original report in the moved version.

7. If you want to assign privileges, uncheck Copy current privileges and visibility checkbox.

8. The user can select other users with whom the moved report will shared from the list of available users or search them in the search user bar.

9. In the similar manner, user can apply privileges to different user roles as follows:-

10. The user can also search for roles in the Search Role bar.
11. Visibility is used to mention who all can view the report and is of following three types:-
    o **Private:-** It means only the current user can view the file.
    o **Internal:-** It means all the users within the organization can view the file.
    o **Public:-** It means anyone can view the file.

12. The user can select the visibility from the dropdown menu as shown above.
13. In case of any further help, the user can click on the �“ icon to access the AIV help documents.
14. Finally, in order to move the report, click on the Move button.
15. If the user is not satisfied and wants to cancel the move request, he can do this by clicking on the cancel button next to move or by clicking on ✖ button next to the �“ icon.
16. As the report is moved, it will be removed from the Reports page and will be added to the explain_moved folder
    o In a similar manner, you can also perform the move operation on the folders selecting the folder you desire to move and choosing the move icon from the toolbar, or by right-clicking the folder and selecting the move option from the elapses shown
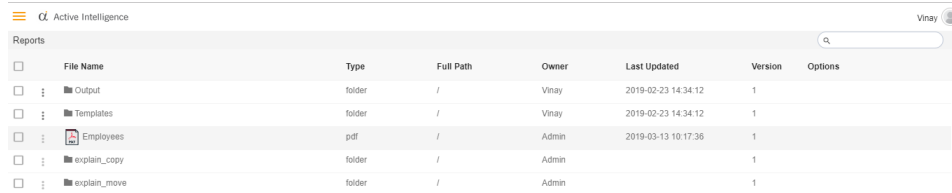
Delete

• There are two ways in which a user can delete a report in the AIV application:-
1. By clicking on the delete icon ▪ Delete located at the bottom most toolbar.
2. By right-clicking the report you want to delete. We will use **ProductList.pdf** report in this tutorial for the purpose of understanding.
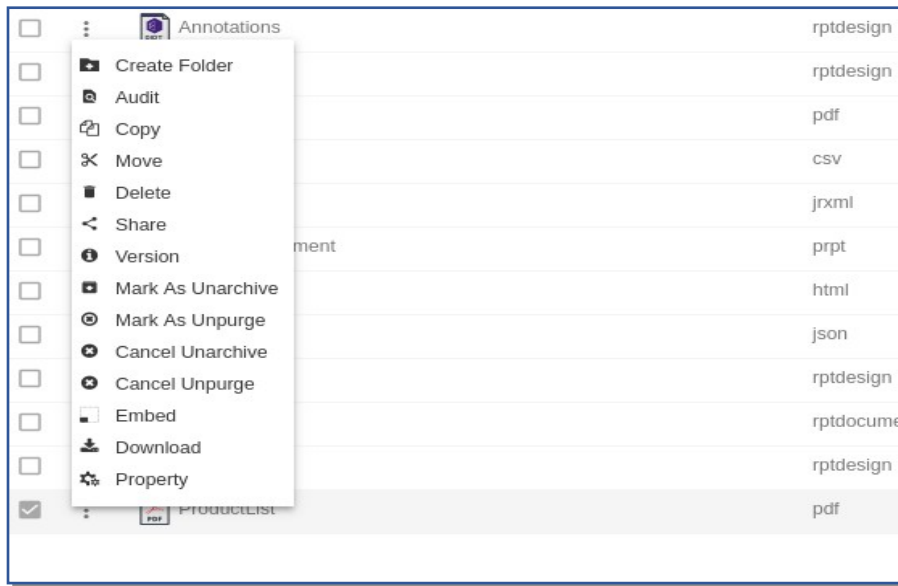
- Finally, press on delete after selecting the report using any one of the above-mentioned methods.
- The report will be deleted and a message will be displayed report deleted successfully.
- In a similar manner, you can also perform the delete operation on the folders selecting the folder you desire to move and choosing the move icon from the toolbar, or by right-clicking the folder and selecting the move option from the elapses shown.

Share

- There are two ways in which a user can share a report in the AIV application:-
    1. By clicking on the share icon ◁ Share located at the bottom most toolbar.
    2. By right-clicking the report you want to share. We will use **Employees.pdf** report in this tutorial for the purpose of understanding.

  a. Now perform the following steps in order to share the report Employee List:
  b. Click on Share using one of the methods mentioned above which will open the following popup.

    3. The user can select other users with whom the report will shared from the list of available users or search them in the search user bar.
    4. In the similar manner, user can select different user roles with whom the report will be shared as follows:-
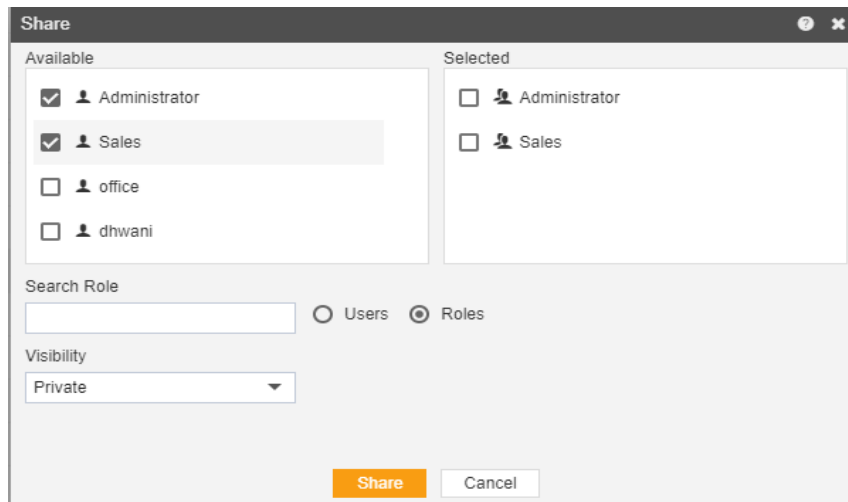
5. The user can also search for the roles in the Search Role bar.
6. Visibility is used to mention who all can view the report and is of following three types:-

- **Private:-** It means only the current user can view the file.
- **Internal:-** It means all the users within the organization can view the file.
- **Public:-** It means anyone can view the file.

7. The user can select the visibility from the dropdown menu as shown above. Select Internal visibility for our reference.
8. In case of any further help, the user can click on the 🛈 icon to access the AIV help documents.
9. Finally, in order to move the report, click on the Move button.
10. If the user is not satisfied and wants to cancel the share request, he can do this by clicking on cancel button next to share or by clicking on ✖ button next to the 🛈 icon.
11. As the report is shared with user named Demo, the report will be visible in the Reports section when login is performed with the credentials of user Demo as follows:-
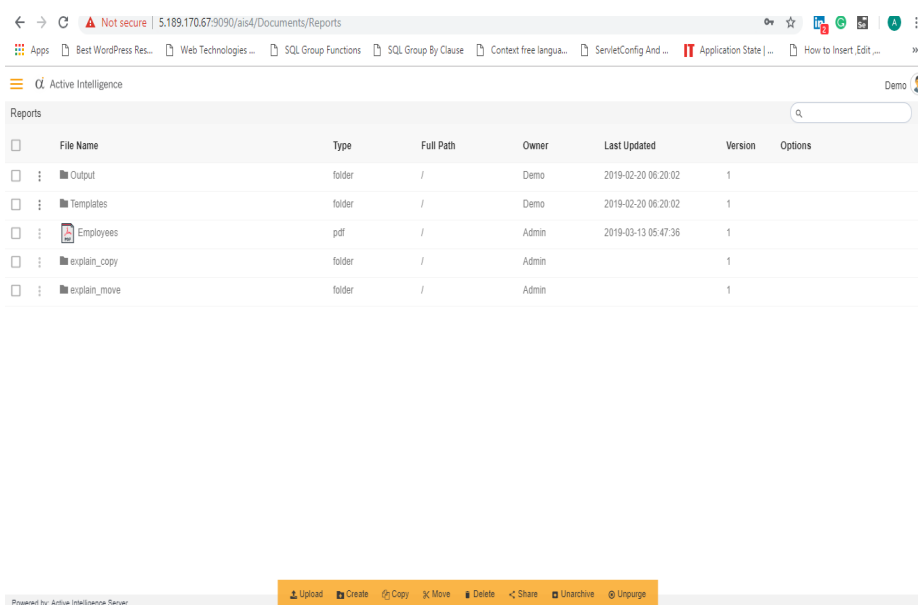
- In a similar manner, you can also perform the share operation on the folders selecting the folder you desire to share and choosing the share icon from the toolbar, or by right-clicking the folder and selecting the share option from the elapses shown.

Schedule Reports

The schedule Reports option is used to run your reports. (Mention the format of the report that can be scheduled). There are two methods to schedule the reports:-

Time schedule:- This includes three methods to schedule events.
      Right now:- If you want to see the output of the report at the current moment.
      Once:- The report will run once at the specific time on the day mentioned by the user.
      Recurring:- If you want to run your report multiple times within an hour, day, week, month or year.

Event Schedule:- When the user wants to schedule their event, after some event is fired, then this type of scheduling comes into the picture.

      Let us understand each of them in detail now:-

Time Scheduling

- The reports can be scheduled at different moments of time based on the requirement of the user.

Right now

- In order to schedule the report at the present moment following steps should be followed:-
- We will be using **Employees.rptdesign** in the report section for the purpose of understanding.
- Double click on the report which will open the following dialog box:-
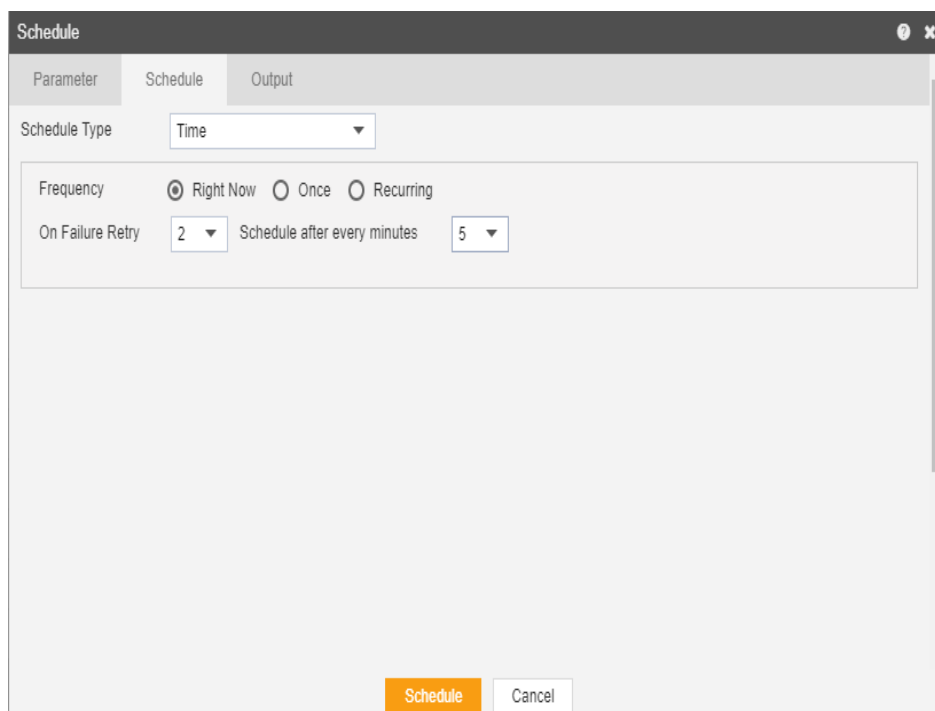
- Go to the schedule tab as shown in the figure above. By default, Schedule Type will be **Time** which can be changed to **Even**t from the drop down menu.
- By default **Right Now** will be selected as the output frequency.
- You can also specify how many times the report should re-execute in case of failure and the interval from the drop down menu shown in the figure. For instance, in our case the report will be executed twice in case of failure within duration of 5 minutes.
- In order to specify the output, go to the output tab as follows:-

- Enter the name by which you want to schedule the report in the Name text area, also provide optional suffix if required.
- Select the format in which you want to generate the output from the dropdown menu. We have selected pdf for our example.
- You can also specify event on success/failure of the report which will trigger an event and execute all the waiting for event reports. We will discuss about this in detail in the event scheduling.
- You can also specify the delivery path on your computer where the reports will be downloaded as follows.

- The user can also send the report as email to the other users using following steps:-

- Select the users and the roles from the drop-down menu.
- Enter your email address/addresses to which you want to send the report via email.
- Select a template from the dropdown, we have selected the Default template for our example.
- Click on Schedule [Schedule] icon in order to schedule the report.
- In case of any further help, the user can click on the ⊘ icon to access the AIV help documents.
- If the user is not satisfied and wants to cancel the move request, he can do this by clicking on the cancel button next to move or by clicking on ✕ button next to the ⊘ icon.

The report is scheduled and output is displayed in pdf format in the new tab. The user can see the schedule request in the Request section of the AIV application. This section displays all the reports that have completed, running, waiting for event or scheduled. In case of report failure, an error is also displayed on this page.

Once

- In order to schedule the report once during an hour, day, week, month or year following steps should be followed:-
- We will be using **Employees.rptdesign** in report section for the purpose of understanding.
- Double click on the report which will open the following dialog box:-

•

- Go to the schedule tab as shown in the figure above. By default Time will be selected, else select schedule type time from the drop down menu.
- Choose Once in the Frequency.
- You can also specify how many times the report should re-execute in case of failure and after how much duration from the drop down menu shown in the figure. For instance, in our case the report will be executed once in case of failure within duration of 5 minutes.
- Click on Share in case you want to share the report with other users.
    - Similarly, you can share the report with different user roles as follows:-

- Here the Visibility is kept Internal for this example.
- If you want you report to be approved before sending to other users, then check Approval Require.
- Send Reminder specifies how many reminder should be sent.
- After days specifies after how many days should the Reminder be sent again.
- Approved by specifies the user name, which is Admin in our case.
- In order to specify the output, go to the output tab as follows:-
    -

- Enter the name by which you want to schedule the report in the Name text area, also provide optional suffix if required.
- Select the format in which you want to generate the output from the dropdown menu. We have selected pdf for our example.
- You can also specify event on success/failure of the report which will trigger an event and execute all the waiting for event reports. We will discuss about this in detail in the event schedule.
- You can also specify the delivery path on your computer where the reports will be downloaded as follows.

-
- The user can also send the report as email to the other users using following steps:-

- Select the users and the roles from the drop down menu.
- Enter your email address/addresses to which you want to send the report via email.
- Select a template from the dropdown, we have selected the Default template for our example.
- Click on Schedule [Schedule] icon in order to schedule the report.
- In case of any further help, the user can click on the [?] icon to access the AIV help documents.
- If the user is not satisfied and wants to cancel the move request, he can do this by clicking on cancel button next to move or by clicking on [X] button next to the [?] icon.

The report is scheduled and output is displayed in pdf format in the new tab. The user can see the schedule request in the Request section of AIV application. This section displays all the reports that have completed, running, waiting for event or scheduled. In case of report failure, an error is also displayed on this page.

Recurring

- In order to schedule the report in a recurring pattern during a hour, day, week, month or year following steps should be followed:-
- We will be using **Employees.rptdesign** in the report section for the purpose of understanding.
- Double click on the report which will open the following dialog box:-

- Go to the schedule tab as shown in the figure above. By default, Time will be selected, else select schedule type time from the drop-down menu.
- Choose Recurring in the Frequency.
- Mention the Start time and End Time by setting the time as shown in the figure depicted above.
- You can provide an optional description for your reference.

- Now, you have to mention recurrence pattern which can be daily, weekly, monthly, yearly or advance.
- In Daily, you can mention the report to recur after specify number of days or to schedule every weekday at specified scheduled time.
- You can specify report to run weekly on specified day/days as follows:-

- Here we have mentioned that the report will run on every Thursday and Saturday at the scheduled time.

- In the above figure, we have mentioned that the report will run every first day each month at a scheduled time till the end time, or you can mention like First Monday of every month as mentioned above.

- You can also specify report to run every year, as mentioned above, here the report will run every year on January 1 at the scheduled time or you can select like First Monday of every February at the scheduled time till the end time.

- In the above figure we have used a recurrence pattern which will schedule a report after each minute.
- To understand in detail about expressions of this type click on which will guide you in detail about how to use these expressions.
- You can also specify how many times the report should re-execute in case of failure and after how much duration from the drop down menu shown in the figure. For instance, in our case the report will be executed once in case of failure within duration of 5 minutes.
- Click on Share in case you want to share the report with other users.
- Similarly, you can share the report with different user roles as follows:-

- Here the Visibility is kept Internal for this example.
- If you want your report to be approved before sending to other users, then check Approval Require.
- Send Reminder specifies how many reminder should be sent.
- After days specifies after how many days should the Reminder be sent again.
- Approved by specifies the user name, which is Admin in our case.
- In order to specify the output, go to the output tab as follows:-

- Enter the name by which you want to schedule the report in the Name text area, also provide optional suffix if required.
- Select the format in which you want to generate the output from the dropdown menu. We have selected pdf for our example.
- You can also specify event on success/failure of report which will trigger an event and execute all the waiting for event reports. We will discuss this in detail in the event schedule.
- You can also specify the delivery path on your computer where the reports will be downloaded as follows.

- The user can also send the report as email to the other users using following steps:-

- Select the users and the roles from the drop-down menu.
- Enter your email address/addresses to which you want to send the report via email.
- Select a template from the dropdown, we have selected the Default template for our example.
- Click on Schedule ![Schedule] icon in order to schedule the report.
- In case of any further help, the user can click on the 🔘 icon to access the AIV help documents.
- If the user is not satisfied and wants to cancel the move request, he can do this by clicking on the cancel button next to move or by clicking on ✖ button next to the 🔘 icon.

The report is scheduled and output is displayed in pdf format in the new tab. The user can see the schedule request in the Request section of the AIV application. This section displays all the reports that have completed, running, waiting for an event or scheduled. In the case of report failure, an error is also displayed on this page.

Event Scheduling

- You can trigger an event with another report as follows:-

- Here we schedule a report named Event Trigger which will trigger event 1 when run successfully.
- After this event is triggered, our Employee report will be executed.

Unarchive

- The main purpose of unarchive in an AIV application is to enable the user to save some of his important files from being archived.
- Usually, each type of file is assigned to be archived after a certain number of days by the Administrator, after which the file goes to the Archive mode.
- Once a file is marked as unarchive, then it will not get deleted when the cycle for archive runs in the AIV application.
- In order to change the settings of the file to be archived/unarchived you need to contact the Administrator.

To Unarchive file and folders follow these steps:

- Select the file or folders you want to Mark as Unarchive. (Note: multiple file and folders or combination of file and folders can be selected).
- Right click and select the Unarchive button from the context menu or directly from the bottom menu as shown in the image below:

	File Name	Type
☐	🖿 Create Folder	folder
☐	🗐 Audit	folder
☐	🗐 Copy	folder
☐	✂ Move	folder
☐	🗑 Delete	folder
☐	⊲ Share	folder
☐	❶ Version	folder
☐	🗐 Mark As Unarchive	folder
☐	⊙ Mark As Unpurge	folder
☐	✪ Cancel Unarchive	folder
☐	✪ Cancel Unpurge	folder
☐	▪ Embed	rptdesign
☐	⬇ Download	rptdesign
☑	⚙ Property 📕 Employees	pdf
☐	⋮ 🗐 Employees	rptdesign

Here Employees.pdf is marked as unarchive and hence it will not get deleted when all other pdf files are archived.

- You can check the archive status of the file by clicking on ⚙ Property as mentioned in the above figure.

- Here "Is Archivable" property of Employees.pdf is False which means this file will not be archived when the cycle for Archive runs.
- In order to run archive jobs, go to the Requests of the Request section.

- Click on the Archive Job in order to perform the Archive which will open the following dialog box.

- Click on **Run Jobs** in order to run the Archive Jobs. The detailed description regarding the same will be given in the Requests section of the AIV application.
- Only the users with administrator rights can run the archive jobs.
- The administrator user can Login to Archive mode to see the details of all the files that have been archived as follow:

- After logging in, following screen will be displayed which shows all the Reports which have been archived.

- You can cancel the unarchive by right clicking the report and selecting cancel unarchive:

- Now check properties to see that "Is Archivable" is true:-

Unpurged

- The main purpose of unpurged in an AIV application is to enable the user to save some of his important files from being deleted permanently.
- Usually, each type of file is assigned to be purged after certain number of days by the Administrator, after which the file gets deleted permanently.
- Once a file is marked as unpurged, then it will not get deleted when the cycle for purge runs in the AIV application.
- In order to change the settings of the file to be purged/unpurged you need to contact the Administrator.

To Unpurged file and folders follow these steps:

- Select the file or folders you want to Mark as Unpurged . (Note: multiple file and folders or combination of file and folders can be selected).
- Right click and select the ⊗ Unpurge button from the context menu or directly from the bottom menu as shown in the image below:
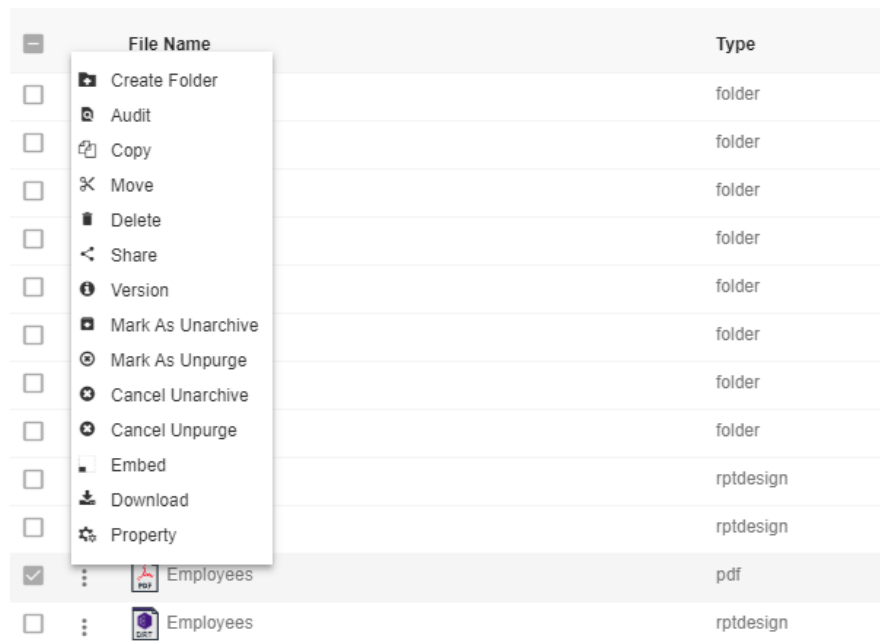
- Here Employees.pdf is marked as unpurged and hence it will not get deleted when all other pdf files are purged.
- You can check the purge status of the file by clicking on ⚙ Property as mentioned in the above figure.

- Here "Is Purgeable" property of Employees.pdf is False which means this file will not be archived when the cycle for Purge runs.
- In order to run purge jobs, go to the Requests in the Request section.

- Click on the Purge Job in order to perform the Purge which will open the following dialog box.

- Click on **Run Jobs** in order to run the Purge Jobs. The detailed description regarding the same will be given in the Requests section of the AIV application.
- Only the users with administrator rights can run the purge jobs.
- The administrator user can Login to Archive mode to see the details of all the files that have been purged as follow:

- After logging in, following screen will be displayed which shows all the Reports which have been purged.

- You can cancel the unpurged by right clicking the report and selecting cancel unpurge:

- Now check properties to see that "Is Purgeable" is true:-

Audit

- Audit shows the actions like when the user created, uploaded or downloaded any particular file.
- Following image describes the audit option.

Version

- Version option shows the number of versions of the selected alert as well as the version which the user is using.
- Following is the image describing the number of versions of the selected report.
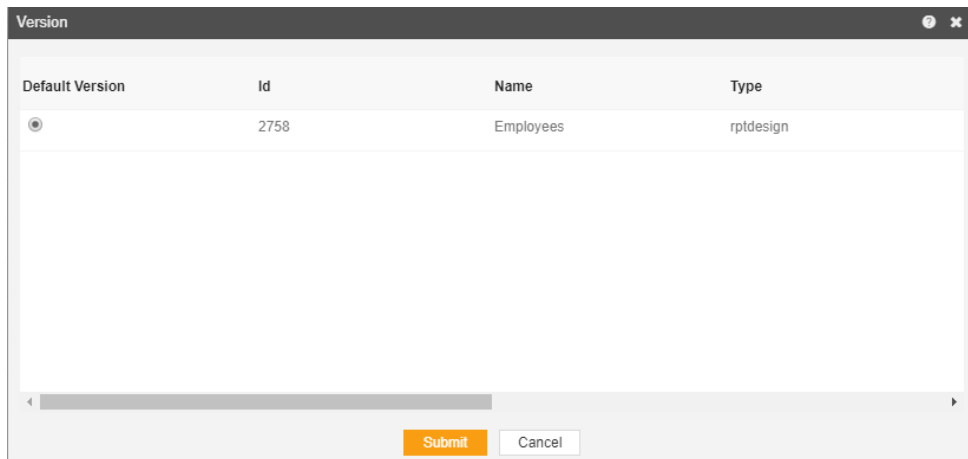
Embed

To Embed a Report, follow these steps: (Only users with Report privilege have access to this section)

 1. To embed a report (select the desire Report and right click and select ◾ Embed from the context menu).

- Following dialog box will appear
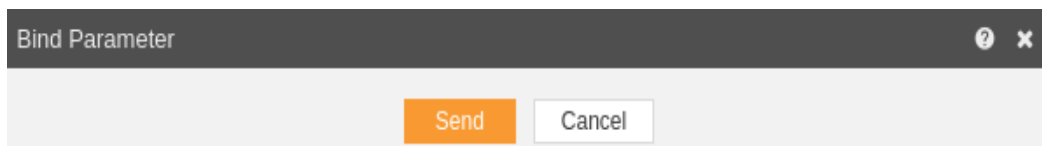
- Click on Send button which will open the following dialog box.
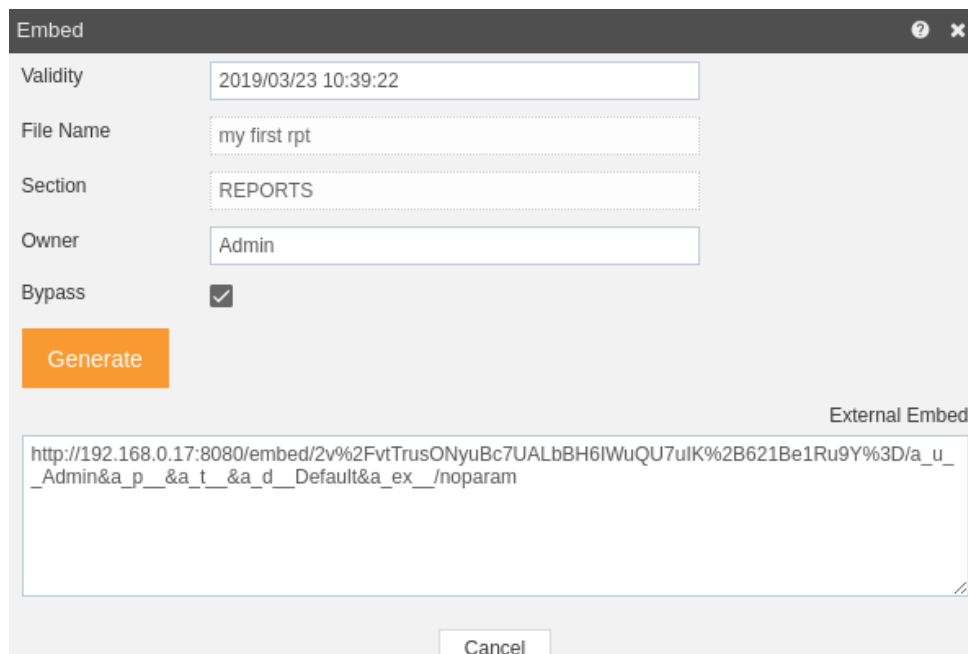
- Set the validity date as shown below:-
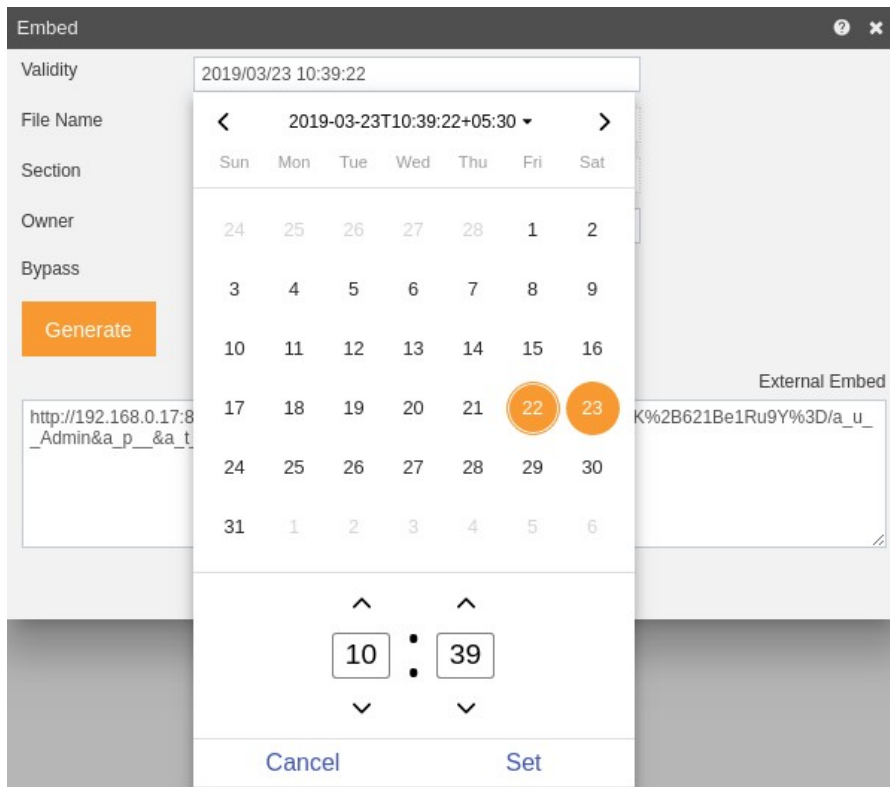
- Click on `Generate` to generate the embed key as shown above.
- Now copy the embed key and paste it on your browser to see the results.

Download

User can download the selected artefact by clicking download option from context menu.
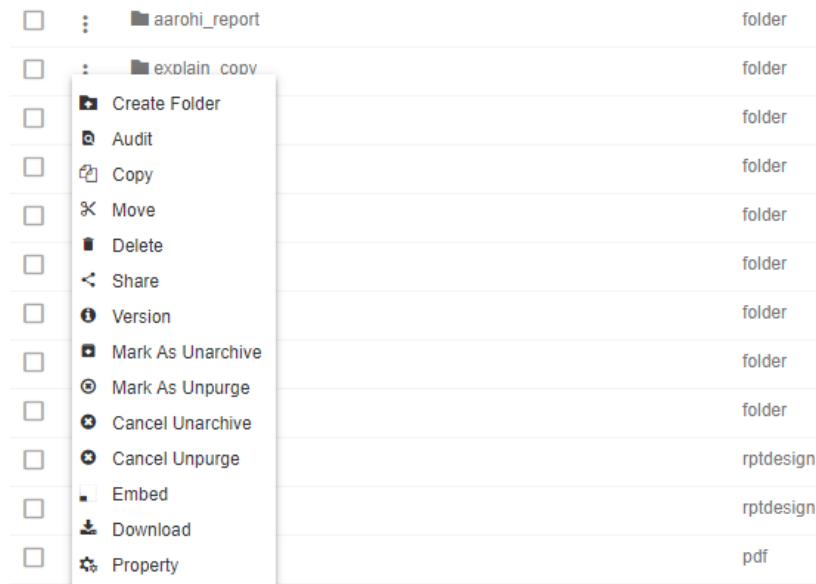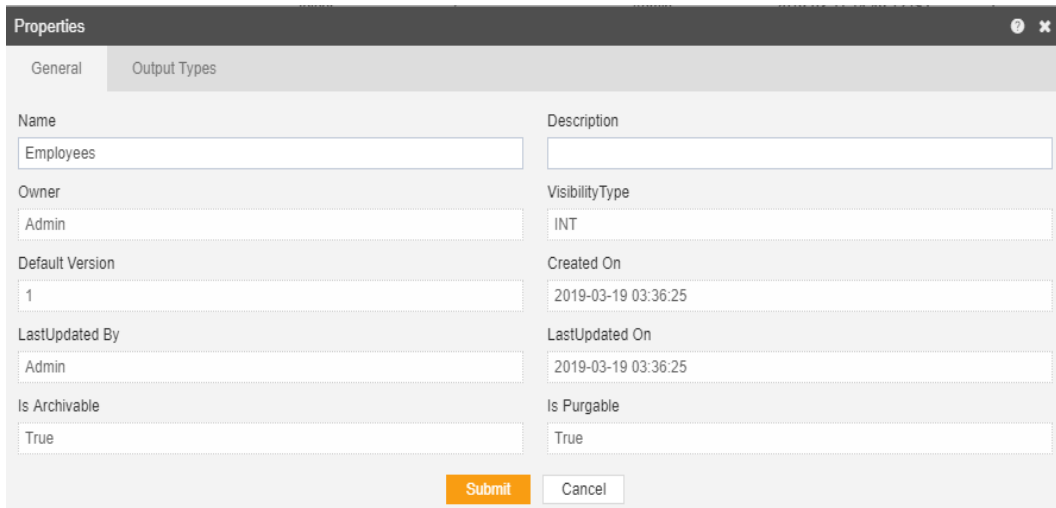
Property
- Use Properties option of the file and folders for the following:
- To update the Name of the file and folders
- To change the Output Types of the File (Note: only applicable to files)

- To view the file and folders Properties such as owner information, last updated by, the file created date, archive and purge options and file visibility i.e. (Private, Internal, Public) and much more.

To view the Property for the file or folder follow the steps below:

1. Select file or folder you wish to see properties for or update the information such as Name or Output Type by selecting ✿ Properties from the context menu, following dialog box will appear as shown in the image below:

2. The Name can be updated (Note: The above image is taken from the Folder Properties, The File Properties will have additional tab for Output Type which will enable users to select/unselect the file Output visibility Type i.e. pdf, doc, HTML, etc.).
3. Finally click Submit button to save the changes to the file Properties, if any.

Merge Reports
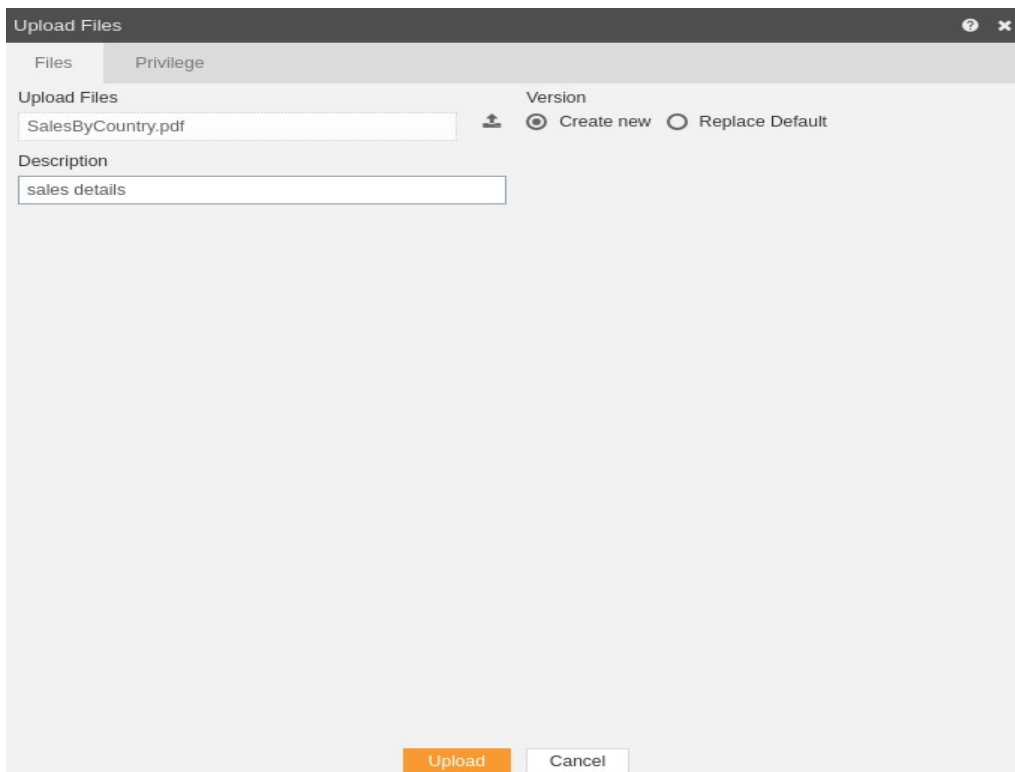
Merge Reports is the second sub-tab under the Documents tab of the AIV application. The Merge Reports section can be accessed by clicking on Merge Reports or by clicking on 🔲 next to the Merge Reports tab, which will open the Merge Reports in a new tab. The primary purpose of the Merge Reports section to perform different functionalities related to reports such as:

1. Upload Reports
2. Delete
3. Share
4. Create Merge Reports
5. Clone
6. Schedule Merge Reports
7. Unarchive
8. Unpurged
9. Audit
10. Version
11. Embed
12. Download
13. Property

Upload

The user can upload reports by clicking on the upload icon ⬆ on the toolbar located at the bottom of the reports page.

- On clicking the icon, following screen will be displayed.

- In the Files section as shown in the figure above, select the upload icon in order to upload your documents from your computer.

If the report already exists on the AIV application, the user has an option to replace the default report or to create a new report using the version option as depicted above.

- Furthermore, the user can also provide an optional description for reference, in the description text area shown here.
- There is also an option to hide the visibility to certain users using the privileges tab as shown in the figure below:

- In case of working with any new version of the report, you can assign the default version share privileges by checking the checkbox. For instance, if there are three versions of the same report and a new version is to be created of that report, than default share privileges can be applied to that report.
- The user can select other users who can share the report from the list of available users or search them in the search user bar.
- In a similar manner, the user can apply privileges to different user roles as follows:-

Just as in case of users, the user can assign default share privileges to different user roles or can select the roles from the Available list of roles.

- The user can also search for roles in the Search Role bar.
- Visibility is used to mention who all can view the report and is of following three types:-
    1. **Private:-** It means only the current user can view the file.
    2. **Internal:-** It means all the users within the organization can view the file.
    3. **Public:-** It means anyone can view the file.
- The user can select the visibility from the dropdown menu as shown above.
- In case of any further help, the user can click on the ⍰ icon to access the AIV help documents.
- Finally, in order to upload the report, click on the upload button.
- If the user is not satisfied and wants to cancel the upload request, he can do this by clicking on the cancel button next to upload or by clicking on ✖ button next to the ⍰ icon.

Delete

- There are two ways in which a user can delete a merge report in the AIV application:-
1. By clicking on the delete icon ▪Delete located at the bottom most   toolbar.

By right-clicking the report you want to delete. We will use **My_new_merge** report in this tutorial for the purpose of understanding.
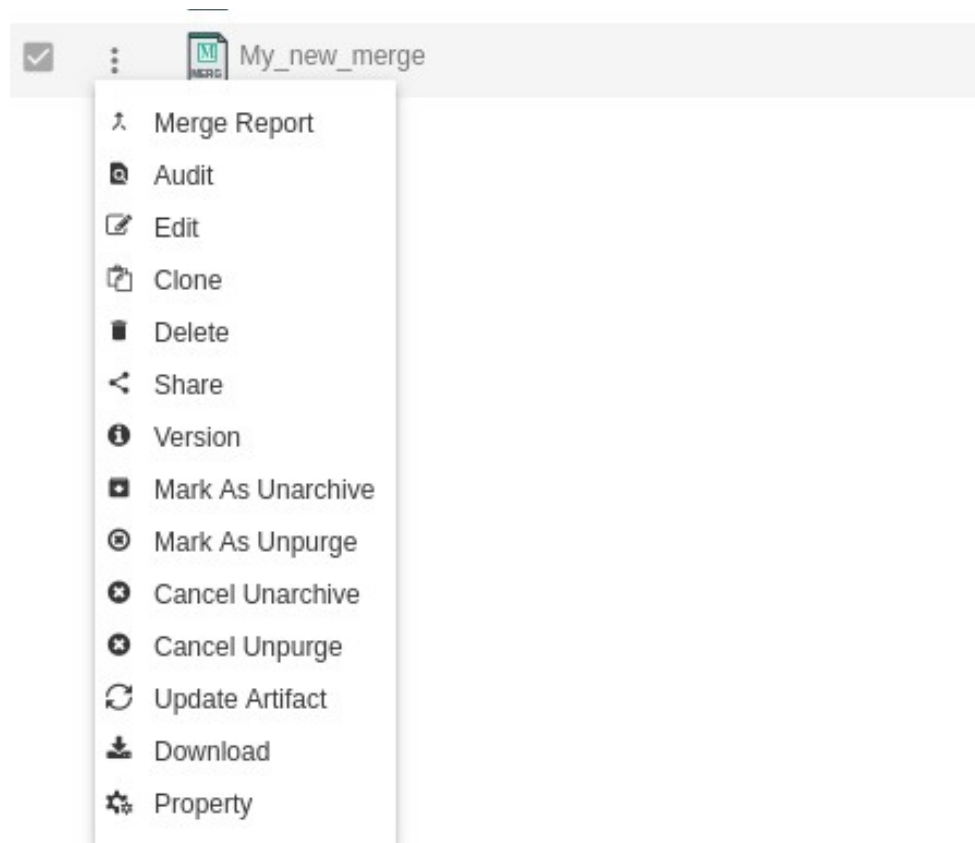
- Finally, press on delete after selecting the report using any one of the above-mentioned methods.
- The report will be deleted and a message will be displayed "report deleted successfully."
- In a similar manner, you can also perform the delete operation on the folders selecting the folder you desire to move and choosing the move icon from the toolbar, or by right-clicking the folder and selecting the move option from the elapses shown.

Share

- There are two ways in which a user can share a report in the AIV application:-
  1. By clicking on the share icon < Share located at the bottom most toolbar.

By right-clicking the report you want to share, We will use the **Merge** report in this tutorial for the purpose of understanding.
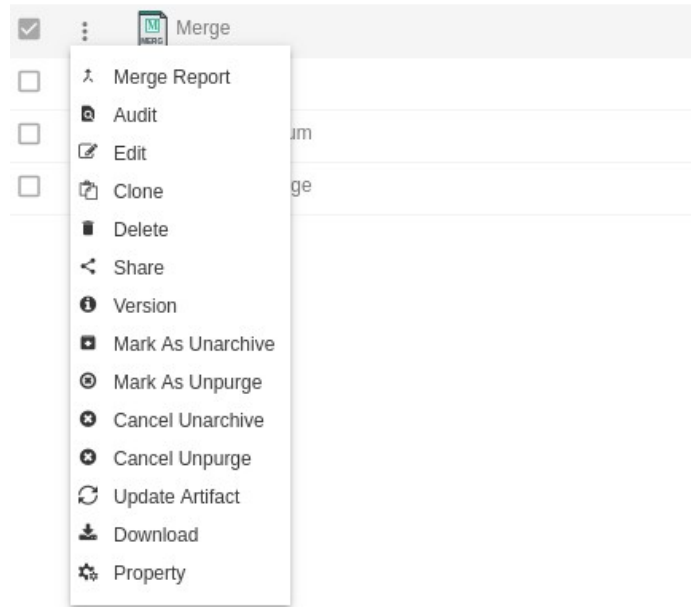
- Now perform the following steps in order to move the report Employee List:

1. Click on Share using one of the methods mentioned above which will open the following popup.
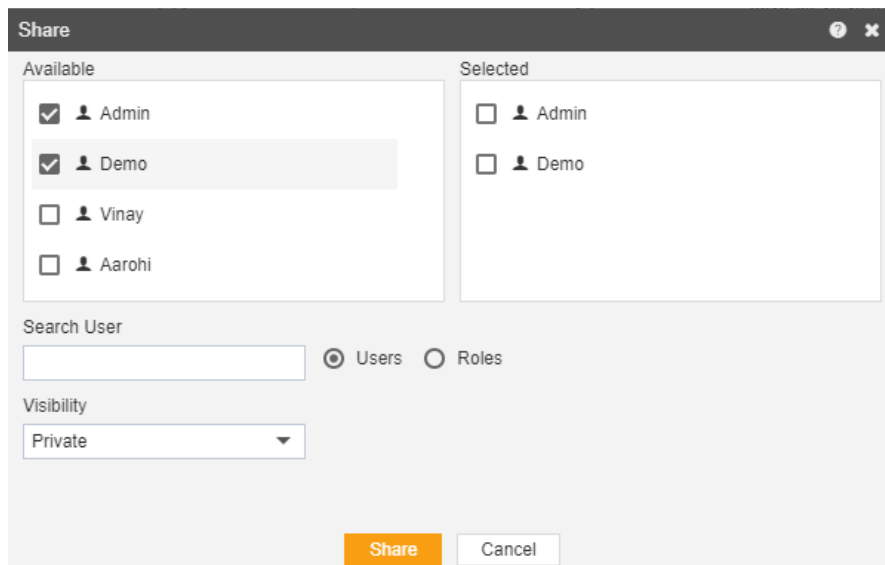
2. The user can select other users with whom the report will share from the list of available users or search them in the search user bar.
3. In a similar manner, the user can select different user roles with whom the report will be shared.

4. The user can also search for roles in the Search Role bar.
5. Visibility is used to mention who all can view the report and is of following three types:-

   - **Private:-** It means only the current user can view the file.
   - **Internal:-** It means all the users within the organization can view the file.
   - **Public:-** It means anyone can view the file.

6. The user can select the visibility from the dropdown menu as shown above. Select Internal visibility for our reference.
7. In case of any further help, the user can click on the ❓ icon to access the AIV help documents.
8. Finally, in order to move the report, click on the Move button.
9. If the user is not satisfied and wants to cancel the share request, he can do this by clicking on cancel button next to share or by clicking on ✖ button next to the ❓ icon.
10. As the report is shared with a user named Demo, the report will be visible in the Reports section when login is performed with the credentials of user Demo as follows:-

- In a similar manner, you can also perform the share operation on the folders selecting the folder you desire to share and choosing the share icon from the toolbar, or by right-clicking the folder and selecting the share option from the elapses shown.

Create Merge Reports

There are two ways in which a user can create merge report in the AIV application:-
1. By clicking on the create icon ⟨⏑ Create⟩ located at the bottom most toolbar.
2. By right clicking any existing merge report as follows:-
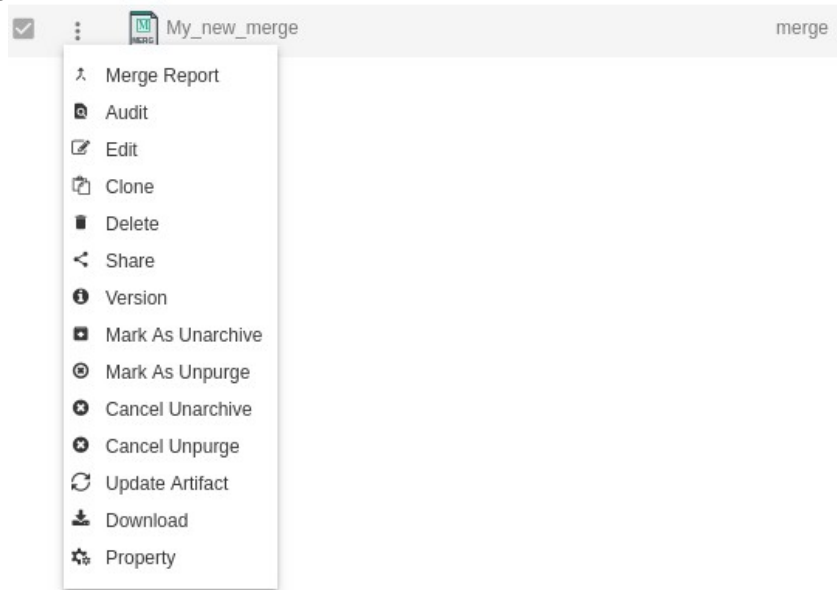
- The following dialog box will open as a result of the above actions performed by the user:-
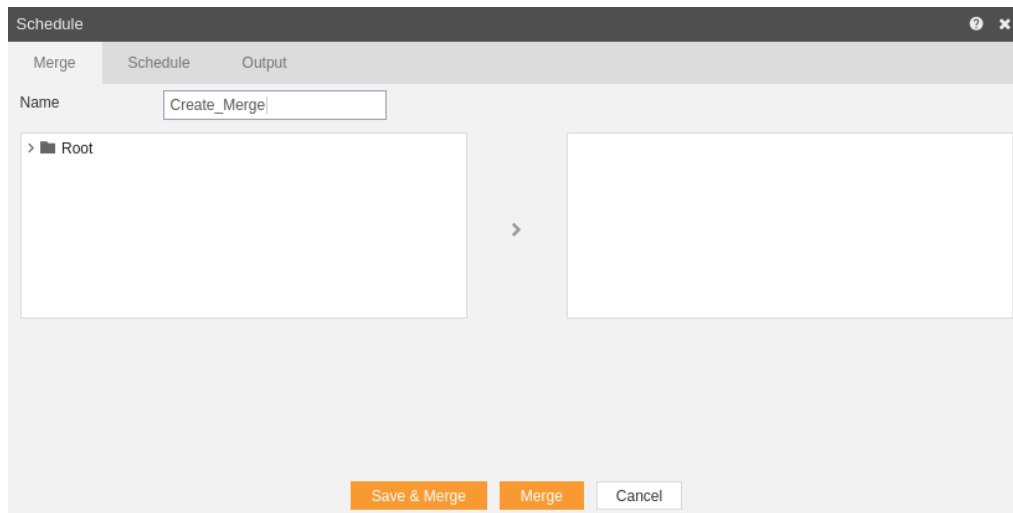
- Expand Root to see the existing reports:-
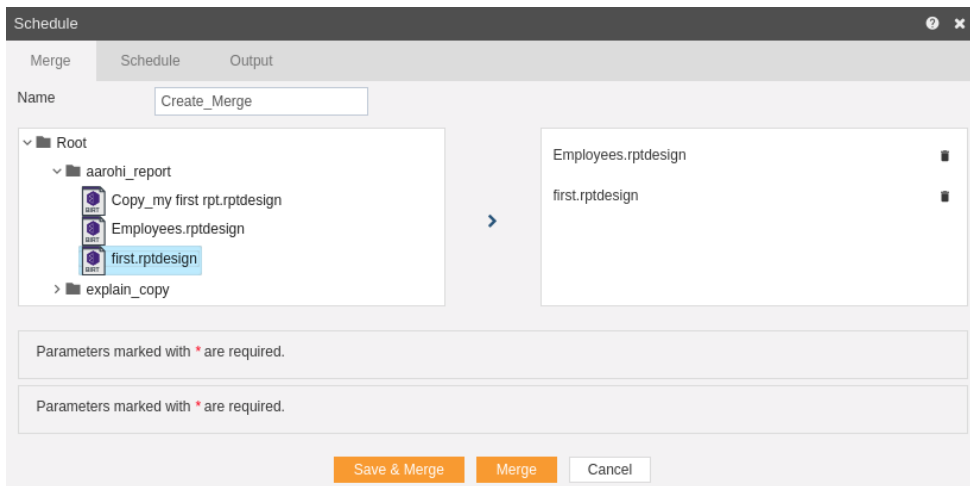
- Give a name to merge report as desired.
- Expand the folder and select any reports you want to merge by selecting them and clicking on the **">"** arrow as seen in the figure above.
- If you want to schedule the merge reports, you can do so by going to schedule section. The detailed explanation of the same has been provided in the **Schedule Merge Reports** section.
- Click on Save and Merge and a merged report will be generated as seen below:-

Clone

Clone enable the user to make a new instance/copy of the selected file.
To Clone Merge Report, follow these steps: (Only users with Merge Reports privilege have access to this section)
There are two ways in which the user can clone a report:-
Right-click and select 🗇 Clone from the context menu as shown in the figure below:-

select [Clone] from the footer menu bar.
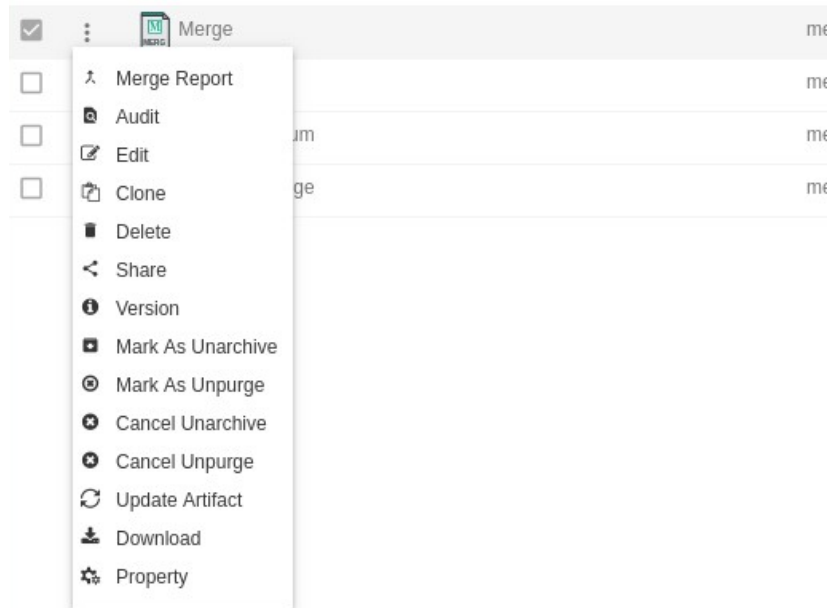
Using any of the above mentioned methods when you clone the merge report following dialog box will appear:
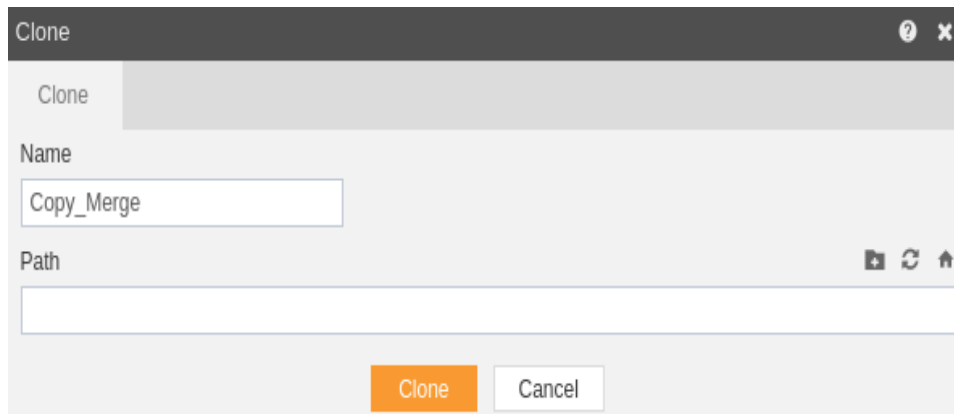
User have option to update the File Name

You can also specify optional path where your cloned report will be saved.

Finally click on [Clone] button to finish creating a copy of selected Merge Report.

In this manner, you can Clone a merge report.

Schedule Merge Reports

The schedule Merge Reports option is used when you want to run your merge reports. (Mention the format of report that can be scheduled).

You can schedule your merge reports at the time of creation of a new merge report.

There are two methods to schedule the merge reports:-

Time Scheduling

The events can be scheduled at different moments of time based on the requirement   of the user. This includes three methods to schedule events

Right now

If you want to see the output of the report at the current moment.
Once:- The report will run once at the specific time on the day mentioned by the user.
Recurring:- If you want to run your report for multiple times within an hour, day, week, month or year.

In order to schedule the report at the present moment following steps should be followed:-
We will be using Merge.merge for the purpose of understanding.

Right click on the report and select ⚹ Merge Report which will open the following dialog box:-

Select the reports that you want to merge and go to schedule as follows:-

Go to the schedule tab as shown in the figure above. By default, Time will be selected else select schedule type time from the drop-down menu.
By default Right Now will be selected as the output frequency.
You can also specify how many times the report should re-execute in case of failure and after how much duration from the drop-down menu shown in the figure. For instance, in our case, the report will be executed twice in case of failure within duration of 5 minutes.
In order to specify the output, go to the output tab as follows:-

Enter the name by which you want to schedule the report in the Name text area, also provide optional suffix if required.

Select the format in which you want to generate the output from the drop-down menu. We have selected pdf for our example.
You can also specify event on success/failure of report which will trigger an event and execute all the waiting for event reports. We will discuss this in detail in the event schedule.

You can also specify the delivery path on your computer where the reports will be downloaded as follows.
The user can also send the report as an email to the other users using the following steps:-

Select the users and the roles from the drop down menu.
Enter your email address/addresses to which you want to send the report via email.

Select a template from the dropdown, we have selected the Default template for our example.

Click on **Save & Merge** or **Merge** icon in order to schedule the report.

In case of any further help, the user can click on the icon to access the AIV help documents.

If the user is not satisfied and wants to cancel the move request, he can do this by clicking on cancel button next to move or by clicking on button next to the icon.

The merge report is scheduled and output is displayed in pdf format in the new tab. The user can see the schedule request in the Request section of AIV application. This section displays all the reports that have completed, running, waiting for event or scheduled. In case of report failure, error is also displayed on this page.

Once

In order to schedule the report once during a hour, day, week, month or year following steps should be followed:-

We will be using Merge.merge for the purpose of understanding.

Right click on the report and select which will open the following dialog box:-

Select the reports that you want to merge and go to schedule as follows:-

Go to the schedule tab as shown in the figure above. By default, Time will be selected, else select schedule type time from the drop down menu. Choose Once in the Frequency.
You can also specify how many times the report should re-execute in case of failure and after how much duration from the drop-down menu shown in

the figure. For instance, in our case, the report will be executed once in case of failure within a duration of 5 minutes.
Click on Share in case you want to share the report with other users.
Similarly, you can share the report with different user roles as follows:-

Here the Visibility is kept Internal for this example.
If you want you're to report to be approved before sending to other users, then check Approval Require.
Send Reminder specifies how many reminder should be sent.
After days specifies after how many days should the Reminder be sent again.
Approved by specifies the user name, which is Admin in our case.
In order to specify the output, go to the output tab as follows:-

Enter the name by which you want to schedule the report in the Name text area, also provide optional suffix if required.

Select the format in which you want to generate the output from the dropdown menu. We have selected pdf for our example.
You can also specify event on success/failure of the report which will trigger an event and execute all the waiting for event reports. We will discuss this in detail in the event schedule.
You can also specify the delivery path on your computer where the reports will be downloaded as follows:-

The user can also send the report as an email to the other users using the following steps:-

Select the users and the roles from the drop down menu.

Enter your email address/addresses to which you want to send the report via email.

Select a template from the dropdown, we have selected the Default template for our example.

Click on [Save & Merge] or [Merge] icon in order to schedule the report.

In case of any further help, the user can click on the [?] icon to access the AIV help documents.

If the user is not satisfied and wants to cancel the move request, he can do this by clicking on cancel button next to move or by clicking on [✕] button next to the [?] icon.

The report is scheduled and output is displayed in pdf format in the new tab. The user can see the schedule request in the Request section of the AIV application. This section displays all the reports that have completed, running, waiting for an event or scheduled. In case of report failure, an error is also displayed on this page.

Recurring

In order to schedule the report in a recurring pattern during a hour, day, week, month or year following steps should be followed:-

We will be using Merge.merge for the purpose of understanding.

Right click on the report and select [⋏ Merge Report] which will open the following dialog box:-

Select the reports that you want to merge and go to schedule as follows:-

Go to the schedule tab as shown in the figure above. By default Time will be selected, else select schedule type time from the drop down menu.
Choose Recurring in the Frequency.
Mention the Start time and End Time by setting the time as shown in the figure depicted above.
You can provide optional description for your reference.

Now, you have to mention recurrence pattern which can be daily, weekly, monthly, yearly or advance.

In Daily, you can mention the report to recur after specify number of days or to schedule every weekday at specified scheduled time.

You can specify report to run weekly on specified day/days as follows:-

Here we have mentioned that the report will run on every Thursday and Saturday at the scheduled time.

In the above figure, we have mentioned that report will run every first day each month at scheduled time till the end time, or you can mention like First Monday of every month as mentioned above.

You can also specify report to run every year, as mentioned above, here the report will run every year on January 1 at scheduled time or you can select like First Monday of every February at scheduled time till the end time.

In the below figure we have used recurrence pattern which will schedule report after each minute.

To understand in detail about expressions of this type click on which will guide you in detail about how to use these expressions.
You can also specify how many times the report should re-execute in case of failure and after how much duration from the drop-down menu shown in the figure. For instance, in our case the report will be executed once in case of failure within a duration of 5 minutes.
Click on Share in case you want to share the report with other users.
Similarly, you can share the report with different user roles as follows:-

Here the Visibility is kept Internal for this example.
If you want your report to be approved before sending to other users, then check Approval Require.
Send Reminder specifies how many reminder should be sent.
After days specifies after how many days should the Reminder be sent again.
Approved by specifies the user name, which is Admin in our case.
In order to specify the output, go to the output tab as follows:-

Enter the name by which you want to schedule the report in the Name text area, also provide optional suffix if required.
Select the format in which you want to generate the output from the dropdown menu. We have selected pdf for our example.

You can also specify event on success/failure of the report which will trigger an event and execute all the waiting for event reports. We will discuss this in detail in the event schedule.

You can also specify the delivery path on your computer where the reports will be downloaded as follows.
The user can also send the report as an email to the other users using the following steps:-

Select the users and the roles from the drop down menu.
Enter your email address/addresses to which you want to send the report via email.

Select a template from the dropdown, we have selected Default template for our example.

Click on [Save & Merge] or [Merge] icon in order to schedule the report.

In case of any further help, the user can click on the [?] icon to access the AIV help documents.

If the user is not satisfied and wants to cancel the move request, he can do this by clicking on cancel button next to move or by clicking on [X] button next to the [?] icon.

The merge report is scheduled and output is displayed in pdf format in the new tab. The user can see the schedule request in the Request section of AIV application. This section displays all the reports that have completed, running, waiting for event or scheduled. In case of report failure, error is also displayed on this page.

Event Scheduling

In order to schedule the report based on event following steps should be followed:-
We will be using Merge.report for the purpose of understanding.

Right click on the report and select [Merge Report] which will open the following:-
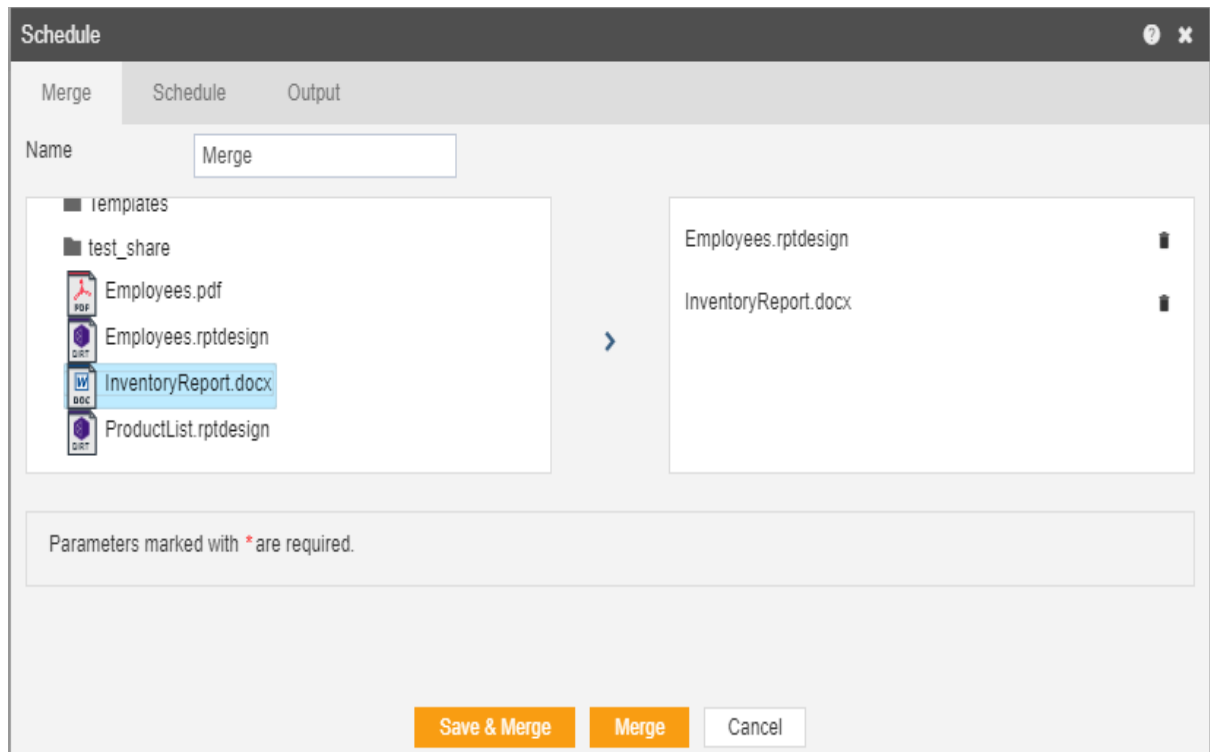
Select the reports that you want to merge and go to schedule as follows:-
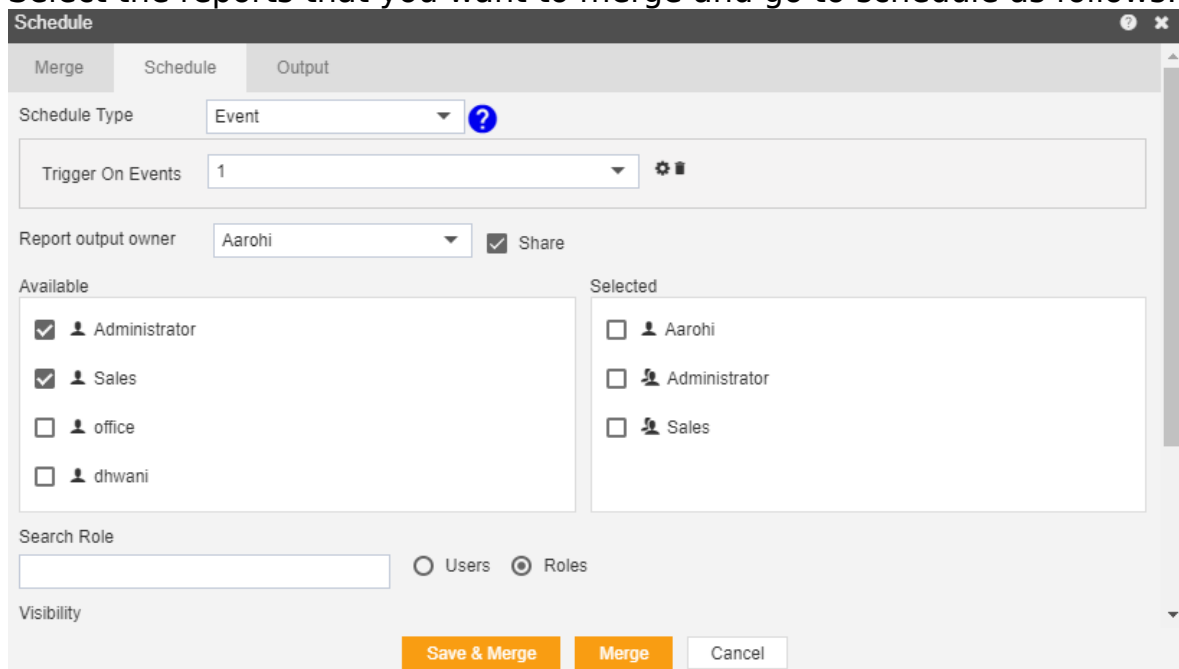
Go to the schedule tab as shown in the figure above. By default, Time will be selected hence select schedule type Event from the drop-down menu. The Trigger on Events define events on the trigger of which report will be scheduled.

Currently event 1 has been created for this example, you can create an event of your own by clicking on ⊕ which will open the following dialog box.

Here we have created event numbered two which is an event related to Report as mentioned in Event Type.
You can provide an optional description of the event as shown above.
You can also send an email to different users when an event is fired.
For this check on event mail and enter the following details.
Enter Users or Roles from the dropdown.
Enter the email address of the user who you want to send the email.
Select the template from dropdown, Default for our case and hit Submit.

If you want some external event to fire click on the which will guide you regarding necessary steps to perform the same.
Now you have successfully created an event which will be visible in the dropdown as follows:-

We will use predefined event 1 for our example so select event 1.
Click on Share in case you want to share the report with other users or user roles
Here the Visibility is kept Internal for this example.
If you want you report to be approved before sending to other users, then check Approval Require.
Send Reminder specifies how many reminder should be sent.
After days specifies after how many days should the Reminder be sent again. Approved by specifies the user name, which is Admin in our case.
In order to specify the output, go to the output tab as follows:-

Enter the name by which you want to schedule the report in the Name text area, also provide optional suffix if required.

Select the format in which you want to generate the output from the dropdown menu. We have selected pdf for our example.
You can also specify event on success/failure of the report which will trigger an event and execute all the waiting for event reports.
You can also specify the delivery path on your computer where the reports will be downloaded as follows.

The user can also send the report as email to the other users using following steps:-

Select the users and the roles from the drop-down menu.

Enter your email address/addresses to which you want to send the report via email.

Select a template from the dropdown, we have selected the Default template for our example.

Click on **Save & Merge** or **Merge** icon in order to schedule the report.

In case of any further help, the user can click on the ? icon to access the AIV help documents.

If the user is not satisfied and wants to cancel the move request, he can do this by clicking on cancel button next to move or by clicking on ✖ button next to the ? icon.

The report is scheduled and you can check that in Requests section Requests tab, go to Waiting for event which shows following screen where the report is waiting for the event to trigger.
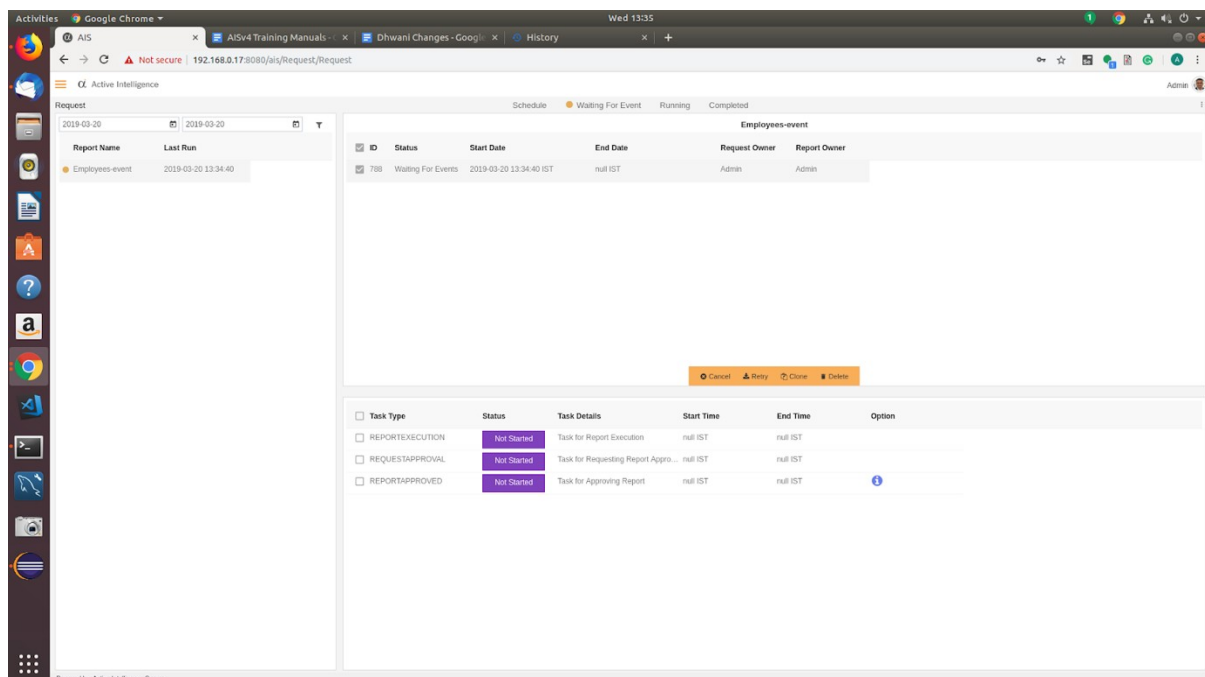
You can trigger an event with another report as follows:-

Here we schedule a report named Event Trigger which will trigger event 1 when running successfully.
After this event is triggered, our Employee report will be executed.

Unarchive

- The main purpose of unarchive in an AIV application is to enable the user to save some of his important files from being archived.
- Usually, each type of file is assigned to be archived after a certain number of days by the Administrator, after which the file goes to the Archive mode.
- Once a file is marked as unarchive, then it will not get deleted when the cycle for archive runs in the AIV application.
- In order to change the settings of the file to be archived/unarchived you need to contact the Administrator.

To Unarchive file and folders follow these steps:

1. Select the file or folders you want to Mark as Unarchive. (Note: multiple file and folders or combination of file and folders can be selected).
2. Right click and select the ▣ Unarchive button from the context menu or directly from the bottom menu as shown in the image below:

- Here Employees.pdf is marked as unarchive and hence it will not get deleted when all other pdf files are archived.
- You can check the archive status of the file by clicking on ⚙ Property as mentioned in the above figure.

- The Is Archivable property of Employees.pdf is False which means this file will not be archived when the cycle for Archive runs.
- In order to run archive jobs, go to the Requests of the Request section.

- Click on the Archive Job in order to perform the Archive which will open the following dialog box.

- Click on in order to run the Archive Jobs. The detailed description regarding the same will be given in the Requests section of the AIV application.
- Only the users with administrator rights can run the archive jobs.

- The administrator user can Login to Archive mode to see the details of all the files that have been archived as follow

- After logging in, following screen will be displayed which shows all the Reports which have been archived.

		File Name	Type	Full Path	Owner	Last Updated	Version	Options
☐	⋮	aarohi_report	folder	/	Admin	2019-03-11 14:49:12 IST	1	
☐	⋮	explain_copy	folder	/	Admin	2019-03-18 16:42:08 IST	1	
☐	⋮	explain_move	folder	/	Admin	2019-03-18 17:49:41 IST	1	
☐	⋮	new report	folder	/	Admin	2019-03-12 17:12:03 IST	1	
☐	⋮	New Root	folder	/	Admin	2019-03-09 10:39:06 IST	1	
☐	⋮	Output	folder	/	Admin	2019-03-13 13:01:26 IST	1	
☐	⋮	Templates	folder	/	Admin	2019-02-26 18:28:56 IST	1	
☐	⋮	test_report	folder	/	Admin	2019-03-18 16:38:11 IST	1	
☐	⋮	test_share	folder	/	Aarohi	2019-03-11 19:01:31 IST	1	
☐	⋮	ProductList	pdf	/	Admin	2019-03-13 10:20:30 IST	1	

- You can cancel the unarchive by right clicking the report and selecting cancel unarchive:

	File Name	Type
☐		folder
☐		folder
☐		folder
☐		folder
☐		folder
☐		folder
☐		folder
☐		folder
☐		rptdesign
☐		rptdesign
☑	⋮ 📄 Employees	pdf
☐	⋮ 📄 Employees	rptdesign

Context menu items:
- ⊞ Create Folder
- 🔍 Audit
- ⎘ Copy
- ✂ Move
- 🗑 Delete
- ＜ Share
- ❶ Version
- ⊡ Mark As Unarchive
- ⊙ Mark As Unpurge
- ✕ Cancel Unarchive
- ✕ Cancel Unpurge
- ▪ Embed
- ⬇ Download
- ⚙ Property

- Now check properties to see that Is Archivable is true:-

Properties ❓ ✖

General

Name	Description
Employees	employee data

Owner	VisibilityType
Admin	INT

Default Version	Created On
1	2019-03-13 10:17:36

LastUpdated By	LastUpdated On
Admin	2019-03-13 10:17:36

Is Archivable	Is Purgable
True	True

Submit   Cancel

Unpurged
- The main purpose of unpurge in an AIV application is to enable the user to save some of his important files from being deleted permanently.
- Usually, each type of file is assigned to be purged after a certain number of days by the Administrator, after which the file gets deleted permanently.

- Once a file is marked as unpurge, then it will not get deleted when the cycle for purge runs in the AIV application.
- In order to change the settings of the file to be purged/unpurged you need to contact the Administrator.

To Unpurge file and folders follow these steps:

1. Select the file or folders you want to Mark as Unpurge. (Note: multiple file and folders or combination of file and folders can be selected).
2. Right click and select the ⊗ Unpurge button from the context menu or directly from the bottom menu as shown in the image below:

- Here Employees.pdf is marked as unpurge and hence it will not get deleted when all other pdf files are purged.
- You can check the purge status of the file by clicking on ⚙ Property as mentioned in the above figure.

- The "Is Purgeable" property of Employees.pdf is False which means this file will not be archived when the cycle for Purge runs.
- In order to run purge jobs, go to the Requests of the Request section.

- Click on the Purge Job in order to perform the Archive which will open the following dialog box.

- Click on **Run Jobs** in order to run the Purge Jobs. The detailed description regarding the same will be given in the Requests section of the AIV application.
- Only the users with administrator rights can run the archive jobs.
- The administrator user can login to Archive mode to see the details of all the files that have been purged as

- After logging in, following screen will be displayed which shows all the Reports which have been purged.

	File Name	Type	Full Path	Owner	Last Updated	Version	Options
☐ ⋮	📁 aarohi_report	folder	/	Admin	2019-03-11 14:49:12 IST	1	
☐ ⋮	📁 explain_copy	folder	/	Admin	2019-03-18 16:42:08 IST	1	
☐ ⋮	📁 explain_move	folder	/	Admin	2019-03-18 17:49:41 IST	1	
☐ ⋮	📁 new report	folder	/	Admin	2019-03-12 17:12:03 IST	1	
☐ ⋮	📁 New Root	folder	/	Admin	2019-03-09 10:39:06 IST	1	
☐ ⋮	📁 Output	folder	/	Admin	2019-03-13 13:01:26 IST	1	
☐ ⋮	📁 Templates	folder	/	Admin	2019-02-26 18:28:56 IST	1	
☐ ⋮	📁 test_report	folder	/	Admin	2019-03-18 16:38:11 IST	1	
☐ ⋮	📁 test_share	folder	/	Aarohi	2019-03-11 19:01:31 IST	1	
☐ ⋮	📄 ProductList	pdf	/	Admin	2019-03-13 10:20:30 IST	1	

- You can cancel the "unpurge" by right clicking the report and selecting cancel unarchive:

	File Name	Type
☐		folder
	▪ Create Folder	
☐	▣ Audit	folder
☐	⧉ Copy	folder
☐	✂ Move	folder
☐	▮ Delete	folder
☐	◁ Share	folder
☐	❶ Version	folder
☐	▣ Mark As Unarchive	folder
☐	⊗ Mark As Unpurge	folder
☐	◉ Cancel Unarchive	folder
☐	◉ Cancel Unpurge	folder
☐	▪ Embed	rptdesign
☐	⬇ Download	rptdesign
☑	⚙ Property	
	⋮ 📄 Employees	pdf
☐	⋮ 📄 Employees	rptdesign

- Now check properties to see that "Is Purgeable" is true:-

Properties ❓ ✖

General

Name	Description
Employees	employee data

Owner	VisibilityType
Admin	INT

Default Version	Created On
1	2019-03-13 10:17:36

LastUpdated By	LastUpdated On
Admin	2019-03-13 10:17:36

Is Archivable	Is Purgable
True	True

Submit   Cancel

Audit

Audit shows the actions like when the user created, uploaded or downloaded any particular file.

- Following image describes the audit option.

Version

- Version option shows the number of versions of the selected alert as well as the version which the user is using.
- Following is the image describing a number of versions of the selected report.

Embed

To Embed a Report, follow these steps: (Only users with Report privilege have access to this section)

1   To embed a report (select the desire Report and right click and select ▪ Embed from the context menu).

- Following dialog box will appear

Bind Parameter   ❓ ✖

Send   Cancel

- Click on Send button which will open the following dialog box.

Embed   ❓ ✖

Validity	2019/03/23 10:39:22
File Name	my first rpt
Section	REPORTS
Owner	Admin
Bypass	✓

Generate

External Embed

http://192.168.0.17:8080/embed/2v%2FvtTrusONyuBc7UALbBH6IWuQU7uIK%2B621Be1Ru9Y%3D/a_u__Admin&a_p__&a_t__&a_d__Default&a_ex__/noparam

Cancel

- Set the validity date as shown below:-

- Click on **Generate** to generate the embed key as shown above.
- Now copy the embed key and paste it on your browser to see the results.

Download

User can download the selected alert by clicking download option from context menu.

Property

- Use Properties option of the file and folders for the following:
- To update the Name of the file and folders
- To change the Output Types of the File (Note: only applicable to files)
- To view file and folders Properties such as owner information, last updated by, the file created date, archive and purge options and file visibility i.e. (Private, Internal, Public) and much more.

To view the Property for the file or folder follow the steps below:

1. Select file or folder you wish to see properties for or update the information such as Name or Output Type by selecting ⚙ Properties from the context menu, following dialog box will appear as shown in the image below:

2. The Name can be updated (Note: The above image is taken from the Folder Properties, File Properties will have additional tab for Output Type which will enable users to select/unselect the file Output visibility Type i.e pdf, doc, HTML, etc.).

3. Finally click [Submit] button to save the changes to the file Properties, if any.

Ad-hoc Tab

- Ad-hoc enables a naive user to create Reports with great ease using drag and drop mechanism to insert graphical elements like the chart on the page.

- The Ad-hoc section can be accessed by clicking on Ad-hoc or by clicking on ⬀ next to the Reports tab, which will open the Reports in a new tab.

- Ad-hoc helps us to insert following graphical elements as follows:-
  1. Table
  2. Chart
  3. Image
  4. Annotations
  5. Text

- Apart from this, a user can also create the following Predefined components from the component library:-
  1. Cover Page
  2. Performance Report

- Ad-hoc also performs following functionalities:-
  1. Upload
  2. Create
  3. Clone
  4. Delete
  5. Share
  6. Unarchive
  7. Unpurge
  8. Audit
  9. Version
  10. Download
  11. Property
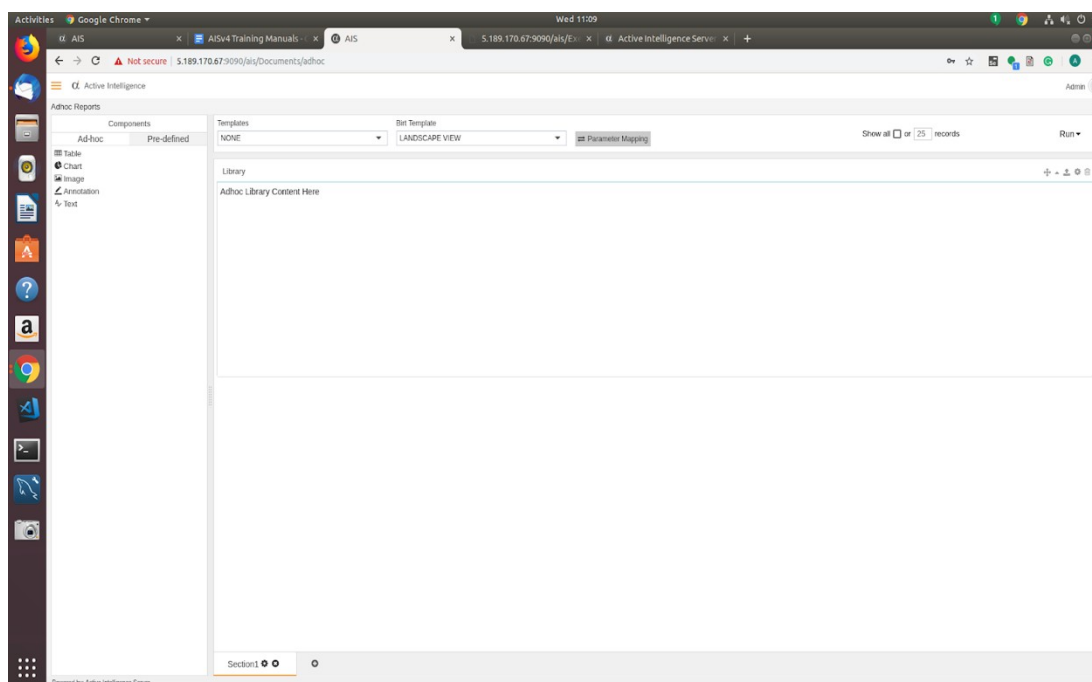
Upload

The user can upload reports by clicking on the upload icon on the toolbar located at the bottom of the Ad-hoc page.

- On clicking the icon, following screen will be displayed...

- In the Files section as shown in the figure above, select the upload icon in order to upload your documents from your computer.
- If the report already exists on the AIV application, the user has an option to replace the default report or to create a new report using the version option as depicted above.
- Furthermore, the user can also provide an optional description for reference, in the description text area shown here.
- There is also an option to hide the visibility to certain users using the privileges tab as shown in the figure below:

- In case of working with any new version of the report, you can assign the default version share privileges by checking the checkbox. For instance, if there are three versions of their same report and a new version is to be created of that report, then default share privileges can be applied to that report.
- The user can select other users who can share the report from the list of available users or search them in the search user bar.

- In a similar manner, the user can apply privileges to different user roles as follows:-

- Just as in case of users, the user can assign default share privileges to different user roles or can select the roles from the Available list of roles.
- The user can also search for roles in the Search Role bar.

- Visibility is used to mention who all can view the report and is of following three types:-
    1. **Private:-** It means only the current user can view the file.
    2. **Internal:-** It means all the users within the organization can view the file.
    3. **Public:-** It means anyone can view the file.
- The user can select the visibility from the dropdown menu as shown above.
- In case of any further help, the user can click on the ⊙ icon to access the AIV help documents.
- Finally, in order to upload the report, click on the upload button.
- If the user is not satisfied and wants to cancel the upload request, he can do this by clicking on cancel button next to upload or by clicking on ✖ button next to the ⊙ icon.

Create Ad-hoc

- There are three ways in which a user can share a ad-hoc report in the AIV application:-
    1. By clicking on the create icon ⌖ Create located at the bottom most toolbar.
    2. By right clicking any existing ad-hoc report/template as follows:-

☐ ⋮ 🅁 Copy_Ais Adhoc test folder

☑ ⋮ 🄸 Copy_AisReport

☐

📋 Create Rof

🔲 Audit

✎ Edit

📄 Clone

🗑 Delete

< Share

ⓘ Version

◻ Mark As Unarchive

◉ Mark As Unpurge

✪ Cancel Unarchive

✪ Cancel Unpurge

↻ Update Artifact

⬇ Download

⚙ Property
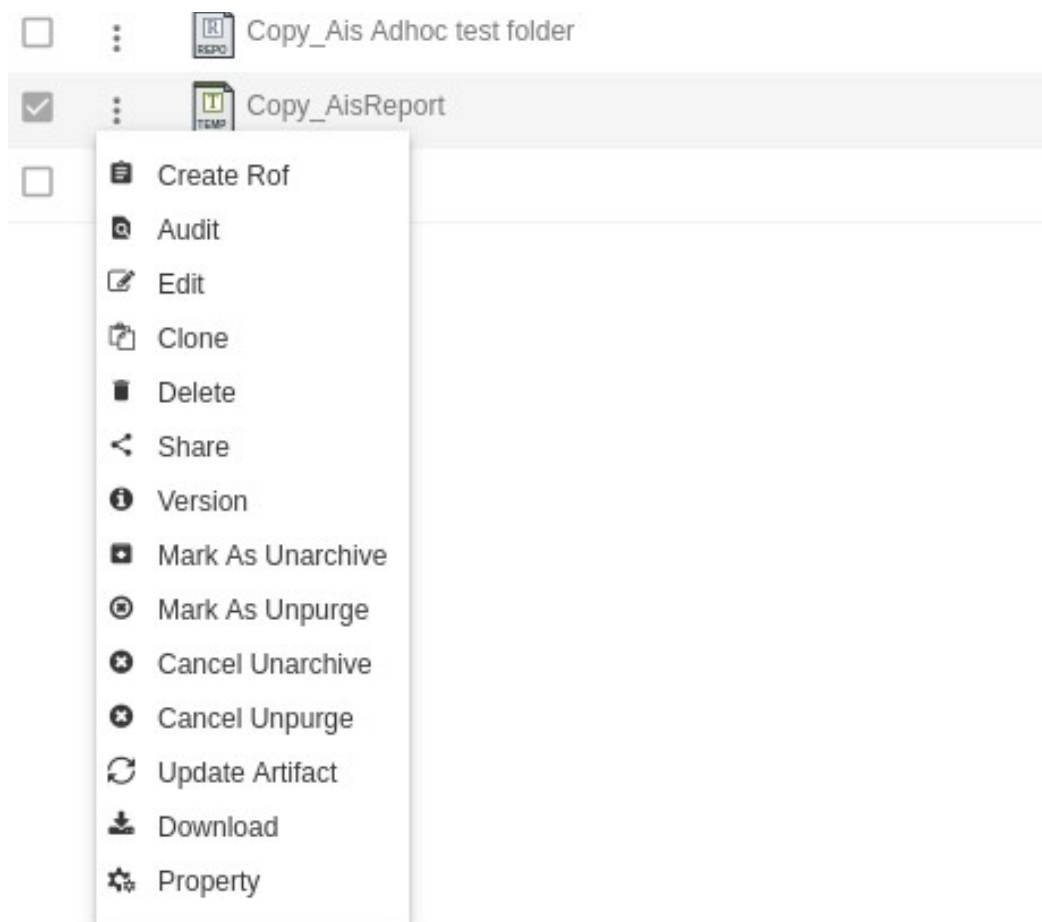
1.   By clicking on ⊕ on the Ad-hoc tab in the Documents section.

- Creating a report using any of the above mentioned methods will open the ad-hoc report create page.
- There are following different components on Ad-hoc Page:-
    1. Table
    2. Chart
    3. Image
    4. Annotations
    5. Text
    6. Cover Page
    7. Performance Report

Table:-
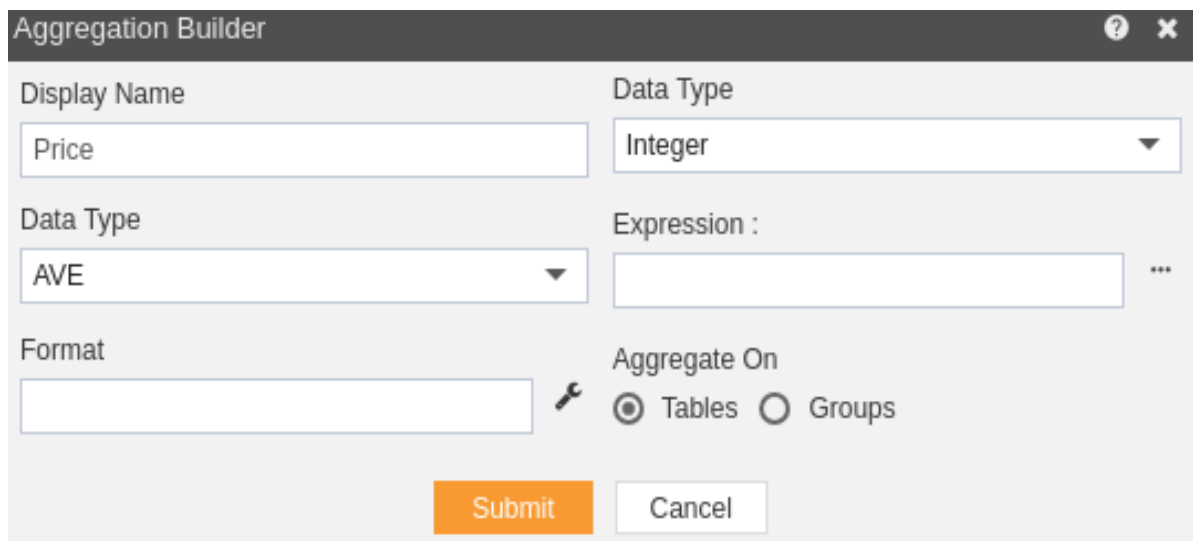
- In order to create a table follow the following steps:-
    1. Drag and drop the table to empty area as shown below:-
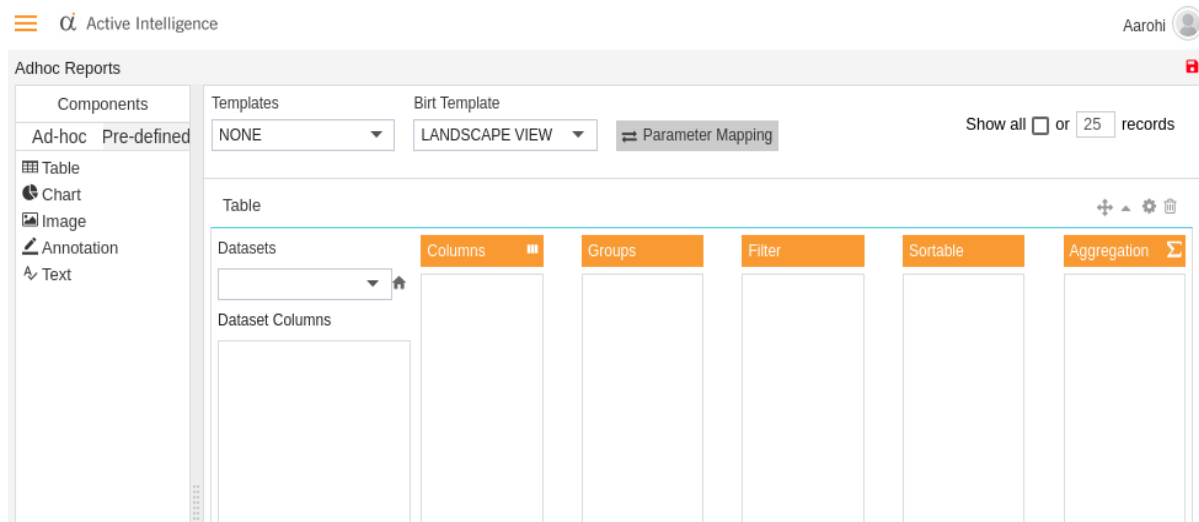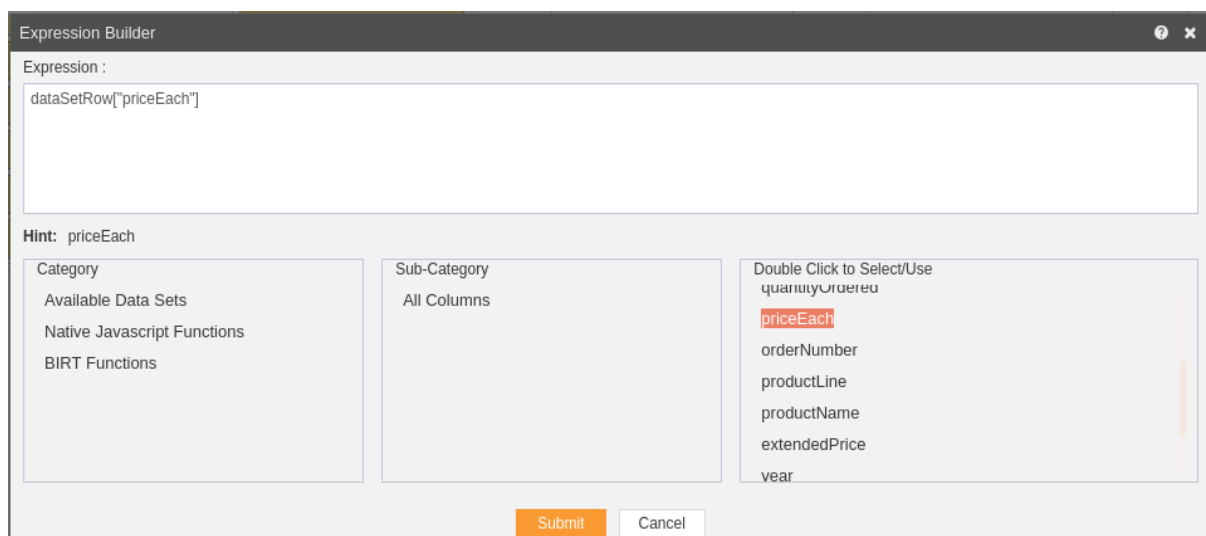
1. Now from the drop down list of Datasets select the Sales.cds as follows:-
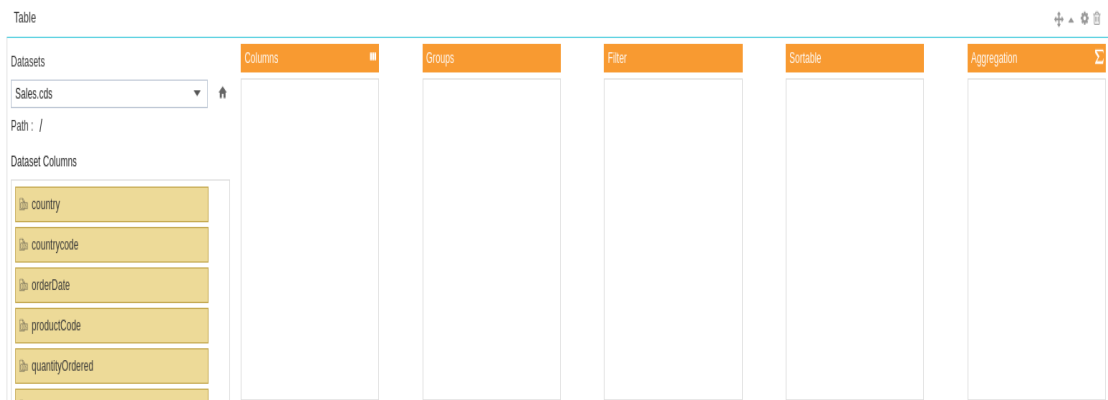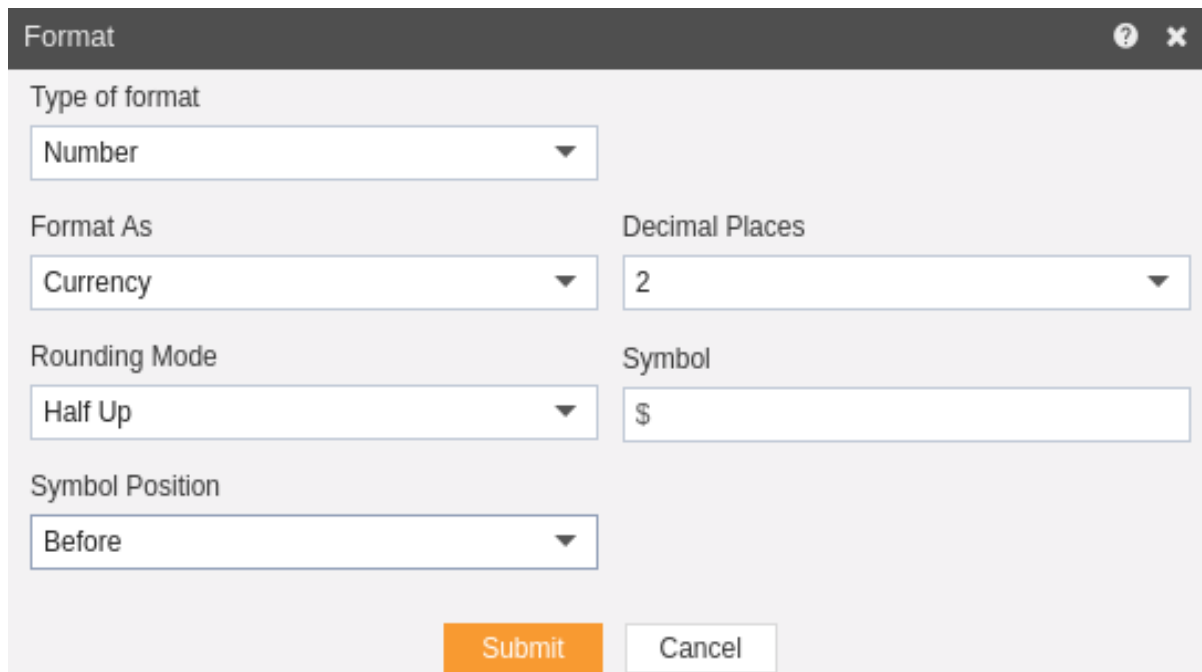
1. You will see all the columns of the Dataset under Dataset Columns.
2. Add productCode, productName, productLine, and priceEach in first Column by dragging the field and dropping it to Column 1.
3. In a similar fashion, add orderNumber to Groups, order Date to sortable and priceEach to Aggregation.
4. The report will group the products with the same order number, filter them based on country name, sort the data in ascending order based on the date on which the product was ordered.
5. In aggregate we have mentioned priceEach, In order to perform an Aggregation function click on Σ .
6. This will open the following dialog box:-

Aggregation Builder

Display Name	Data Type
Price	Integer ▼

Data Type	Expression :
AVE ▼	•••

Format	Aggregate On
🔧	⦿ Tables ◯ Groups

Submit   Cancel

7. Enter the display name as Price and Data Type as Integer.

7. In order to specify the Expression, click on Expression builder ••• as follows:-

Expression Builder

Expression :

dataSetRow["priceEach"]

Hint: priceEach

Category	Sub-Category	Double Click to Select/Use
Available Data Sets	All Columns	quantityOrdered
Native Javascript Functions		priceEach
BIRT Functions		orderNumber
		productLine
		productName
		extendedPrice
		year

Submit   Cancel

9. In the Category select Available Data sets.
9. Select All Columns in sub category and double click pricerEach to use the expression. Click the submit button.

9. You can specify the format by clicking on the 🔧 button which opens the following dialog box.

12. Select format type as Number and Format As Currency from dropdown.
12. Round up to 2 decimal places, with Rounding mode Half Up and Symbol $ with position of symbol Before the number.
12. Hit the Submit button to save the format and again hit submit to save Aggregation.
12. In order to run the table widget click on Run in the topmost right corner as follows:-
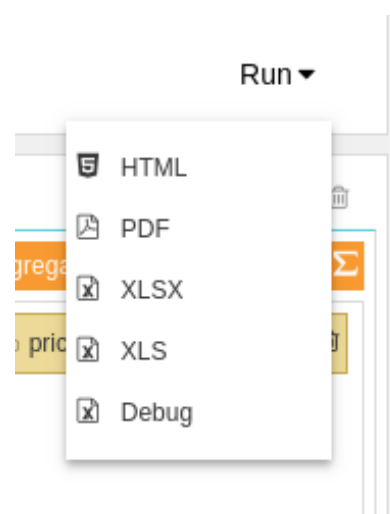
16. For this example, we select Run as HTML.
16. Click on HTML which will open the following dialog box:-
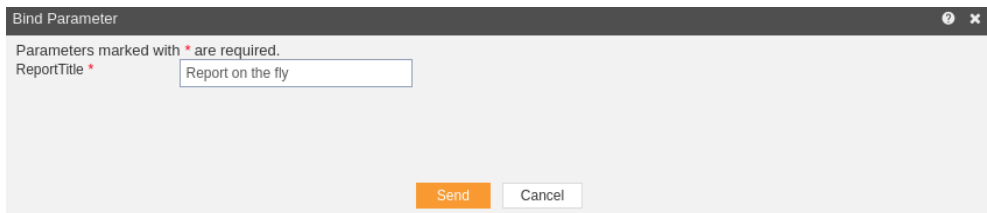
18. As the table has no parameters, just click on Send.

19. The following report will be generated in HTML.

productCode	productName	productLine	priceEach
• 10100			
S18_1749	1917 Grand Touring Sedan	Vintage Cars	171.7
S18_2248	1911 Ford Town Car	Vintage Cars	67.8
S18_4409	1932 Alfa Romeo 8C2300 Spider Sport	Vintage Cars	86.51
S24_3969	1936 Mercedes Benz 500k Roadster	Vintage Cars	34.47
• 10101			
S18_2325	1932 Model A Ford J-Coupe	Vintage Cars	151.28
S18_2795	1928 Mercedes-Benz SSK	Vintage Cars	145.13
S24_1937	1939 Chevrolet Deluxe Coupe	Vintage Cars	31.2
S24_2022	1938 Cadillac V-16 Presidential Limousine	Vintage Cars	53.76
• 10102			
S18_1342	1937 Lincoln Berline	Vintage Cars	123.29
S18_1367	1936 Mercedes-Benz 500K Special Roadster	Vintage Cars	50.14
• 10103			
S10_1949	1952 Alpine Renault 1300	Classic Cars	207.87
S10_4962	1962 LanciaA Delta 16V	Classic Cars	128.53
S12_1666	1958 Setra Bus	Trucks and Buses	125.74
S18_1097	1940 Ford Pickup Truck	Trucks and Buses	112.0
S18_2432	1926 Ford Fire Engine	Trucks and Buses	54.09

20.   You can change the template format from the BIRT Templates as follows:-
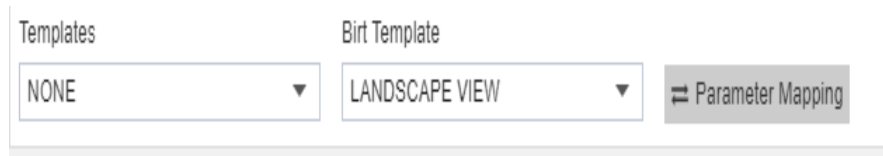
21.   You can also specify the number of records you want to show on a page from the following widget near the template selector widget:-

22. If you want to save your chart you can click on the save button at the topmost right corner below admin which will open the following dialog box:-
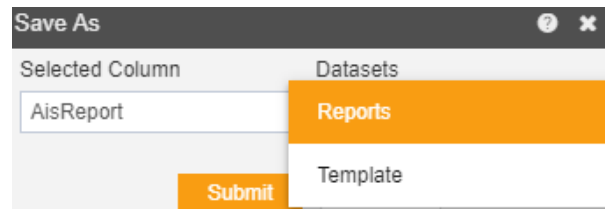
23.   You can give your own name in selected column, and select format as Report/Template and press submit button to perform save operation.

24. If you want to change the settings of a widget click on below Run which will open the following dialog box:-
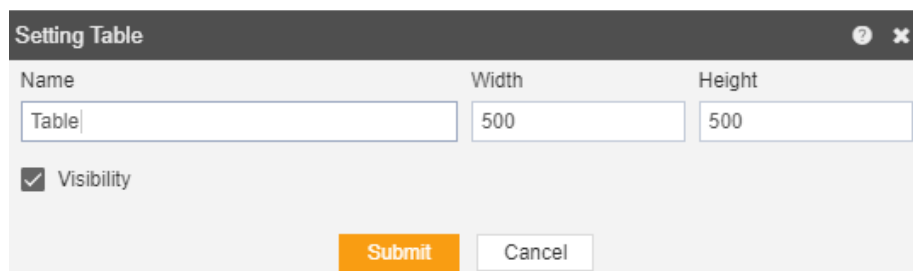
25.   Here you can change name, width, height and visibility of your chart.

26. Similarly press 🗑 in order to delete the chart widget.

27.

Chart

- In order to create a chart follow the following steps:-
- You can insert a chart below another widget like table as follows:-
-

- You can also create chart on a new page as follows:-

-

- Now follow the following steps:-

  1 Drag and drop the chart to empty area as shown above:
  2 Now from the drop down list of Datasets select the Sales.cds as follows:-
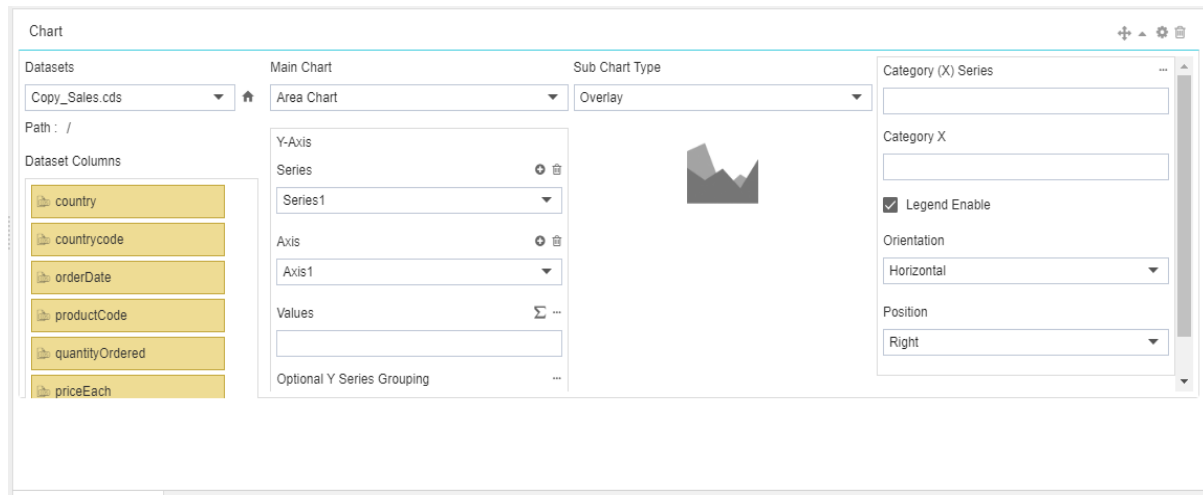
3. You will see all the columns of the Dataset under Dataset Columns.
3. Select Area chart in the Main Chart from the dropdown.
3. In the sub-chart type select Overlay.
3. Now drag and drop productName to Values in Y axis and country to optional Y series grouping.
3. In the similar fashion, add productLine to Category X.
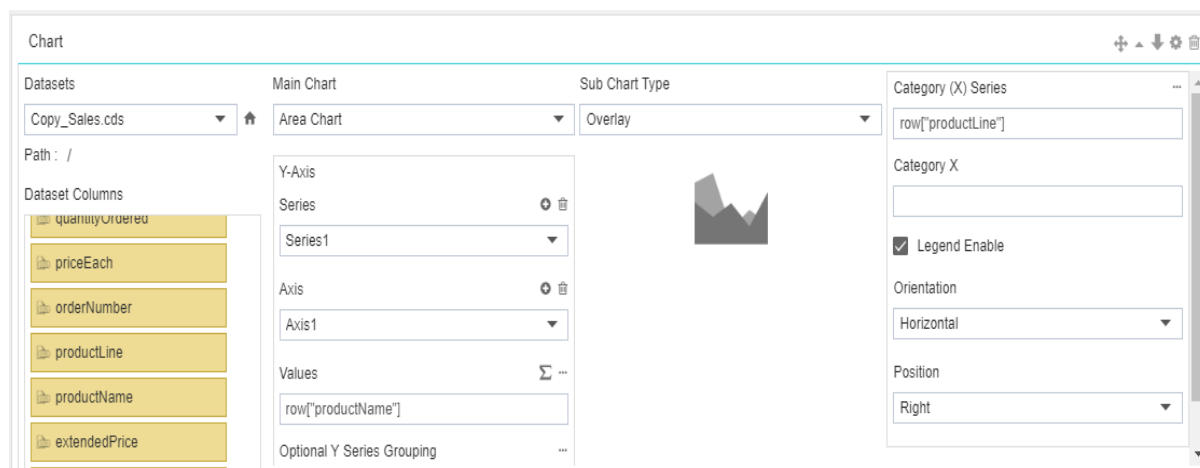
8. Leave everything else as it is in the chart and run the chart as HTML in order to see the how chart is displayed.
8. In order to run the table widget click on Run in the topmost right corner as follows:-

Run ▾


```
🔲  HTML
📄  PDF
📗  XLSX
📗  XLS
📗  Debug
```

9. For this example, we select Run as HTML.
10.   Click on HTML which will open the following dialog box:-

Bind Parameter   ❓ ✖

Parameters marked with * are required.
ReportTitle * | Report on the fly |

                                          Send   Cancel
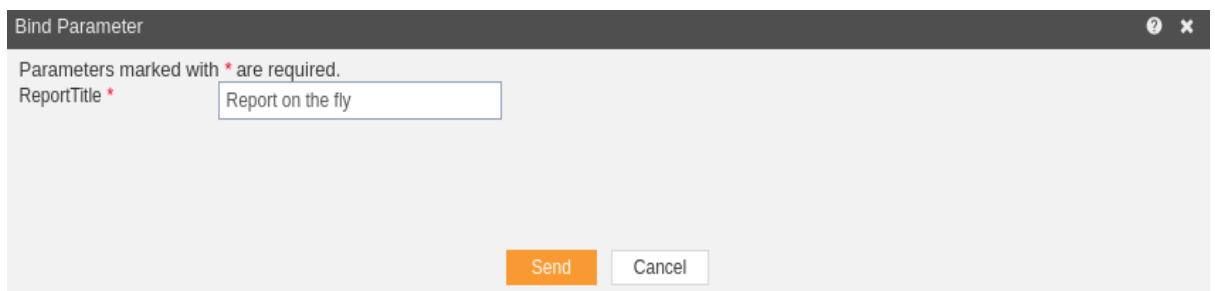
11.   As the chart has no parameters, just click on Send.
12.   The following chart will be generated in HTML.

Chart

13. You can change the template format from the Birt Templates as follows:-
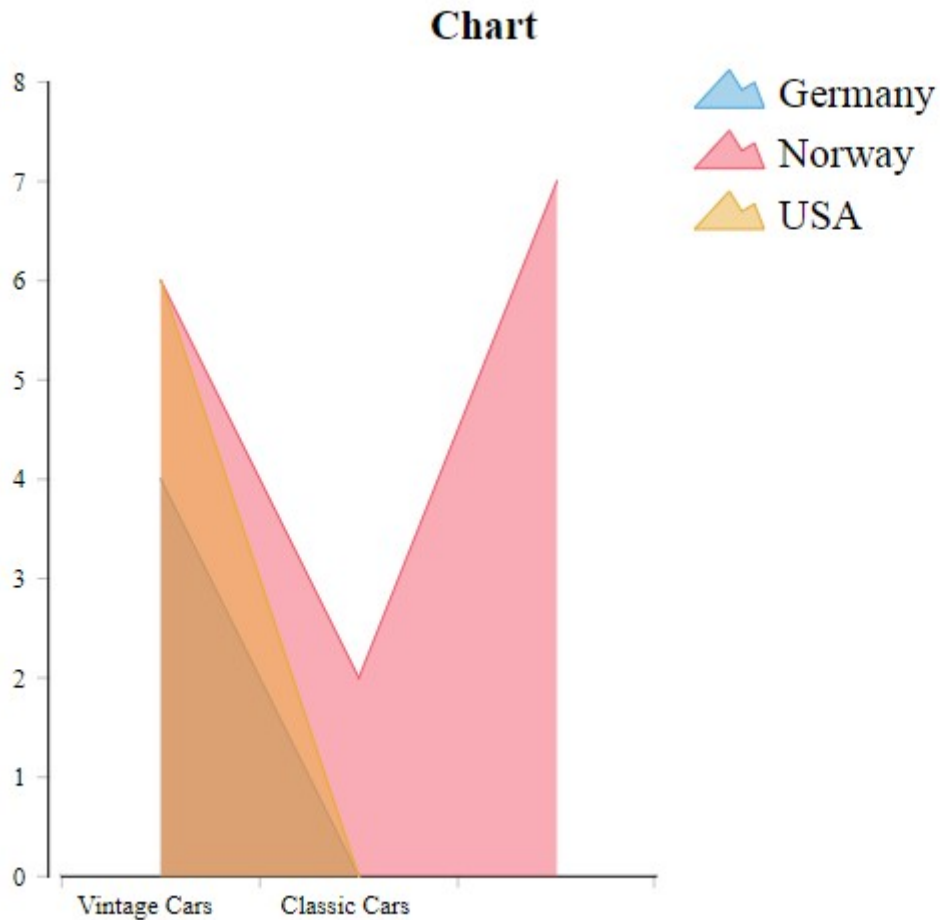
Templates	Birt Template	
NONE ▼	LANDSCAPE VIEW ▼	⇄ Parameter Mapping

14. You can also specify the number of records you want to show on a page from the following widget near the template selector widget:-

Show all ☐ or 25 records

15. If you want to save your chart you can click on the save button 🖫 at the topmost right corner below admin which will open the following dialog box:-
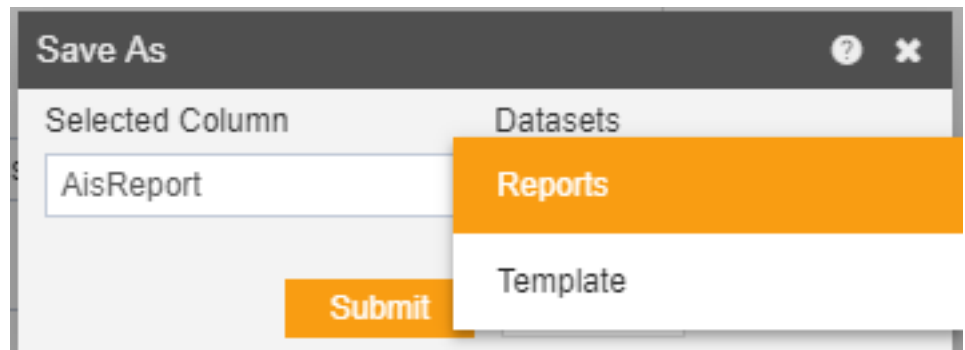
16.   You can give your own name in selected column, and select format as Report/Template and press submit button to perform save operation.

17.

18. If you want to change the settings of a widget click on ⚙ below Run which will open the following dialog box:-
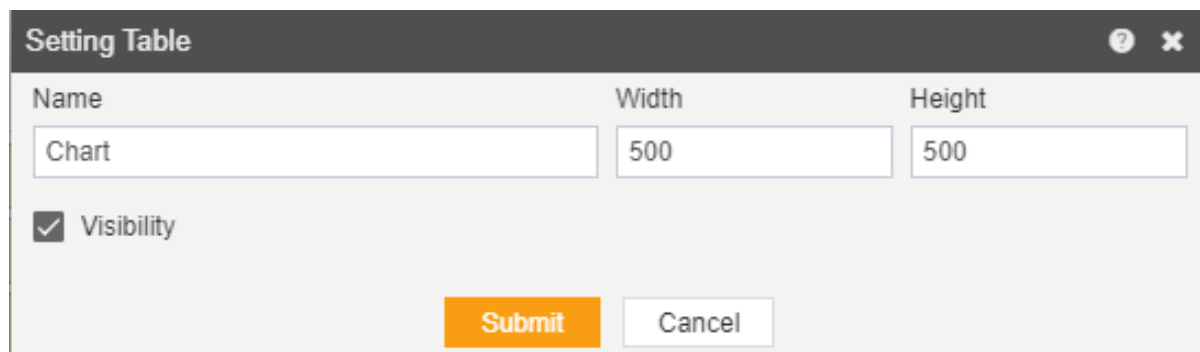
19.   Here you can change name, width, height and visibility of your chart.

20. Similarly press 🗑 in order to delete the chart widget.

21.

Image

- In order to insert an image in your adhoc report follow the following steps:-
- You can insert a image below another widget like table.
- You can also create image on a new page as follows:-
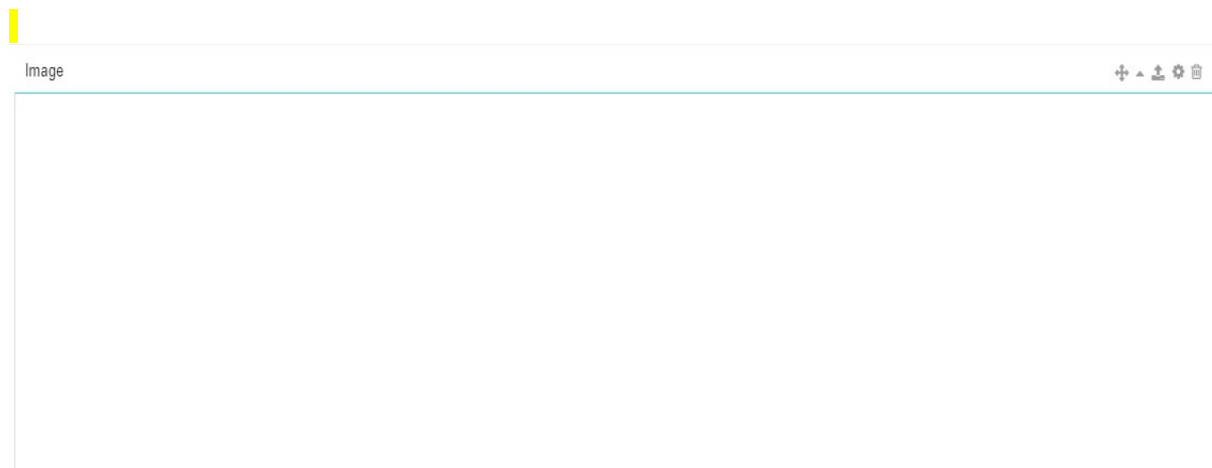
Image

- Now follow the following steps:-

1. Drag and drop the image to empty area as shown above.

2. Now click on ⬆ to upload an image to your adhoc report.
3. This will open the following dialog box:-
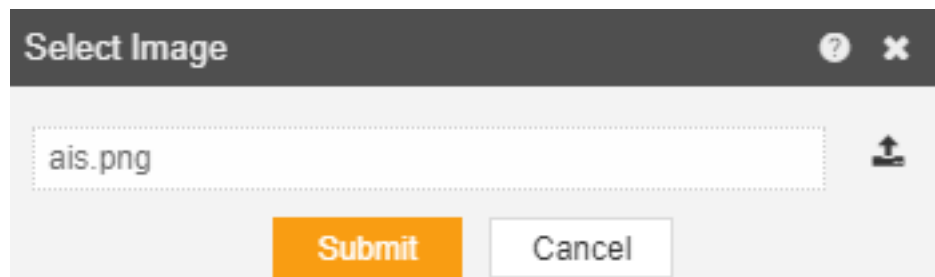
4. To select an image from your computer select ⬆ and select an image and press submit to save it.
5. You have now successfully inserted an image as follows:-

6. In order to run the image widget click on Run in the topmost right corner as follows:-

7. For this example, we select Run as HTML.
8. Click on HTML which will open the following dialog box:-

Bind Parameter

Parameters marked with * are required.
ReportTitle *   Report on the fly

Send   Cancel

9. As the chart has no parameters, just click on Send.
10.   The following image will be generated in HTML.

Active Intelligence

Transform data into Information

11.   You can change the template format from the Birt Templates as follows:-

12.   If you want to save your image you can click on the save button 💾 at the topmost right corner below admin which will open the following dialog box:-

13.   You can give your own name in selected column, and select format as Report/Template and press submit button to perform save operation.

14.   If you want to change the settings of a widget click on ⚙ below Run which will open the following dialog box:-

15. Here you can change name, width, height and visibility of your image.

16. Similarly press ⎘ in order to delete the image widget.

Annotation
- Annotations are critical or explanatory notes added to a text, image or other data. They are references that point to the specific part of data.
- Annotations enables users to add shapes and text to make information more meaningful for the business.
- The detailed explanation regarding Annotations will be given in the Annotations section of Master Data.
- In this tutorial, we will learn how to add Annotations to the Adhoc report in an AIV application.
- In order to add Annotations to the Adhoc report perform following steps:-
1. Drag and drop the Annotation to empty area as shown below:-
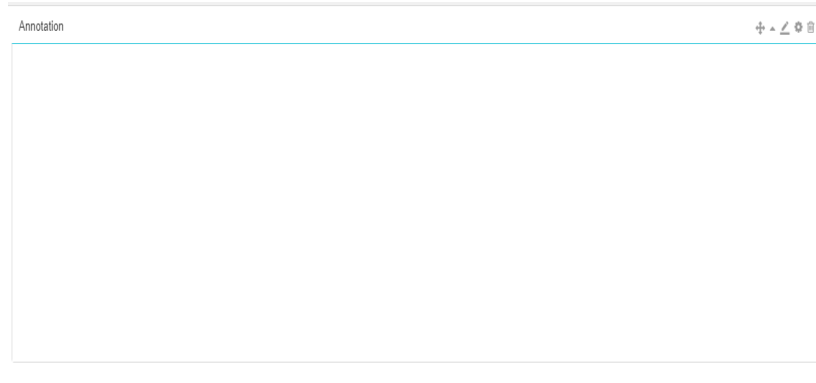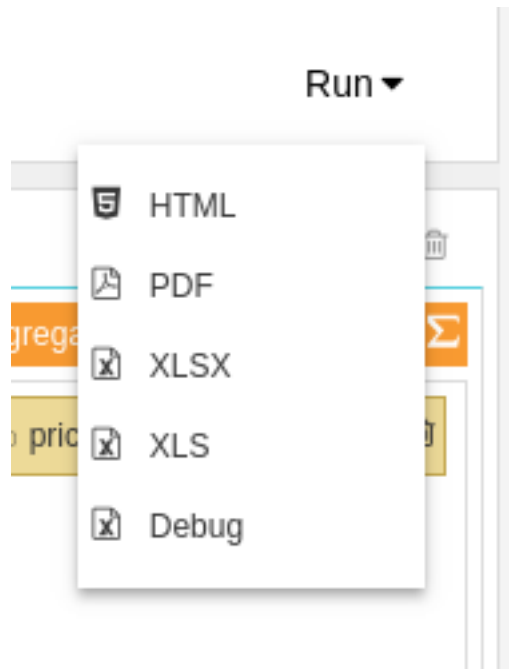
2. Now click on to write an annotation message.
3. This will open the following dialog box:-
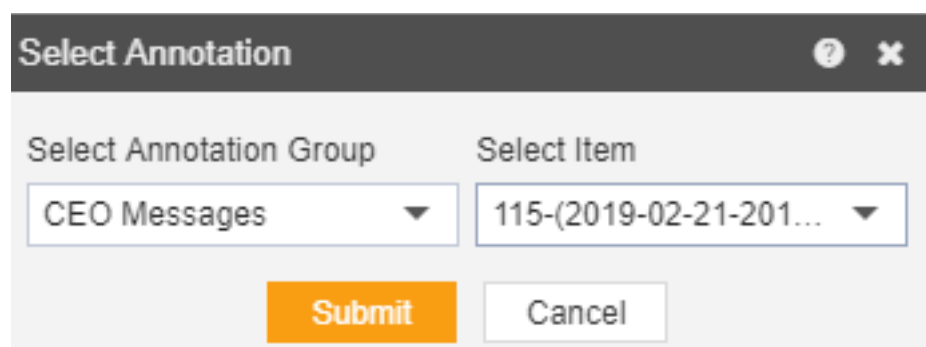
4. Select Annotation group as CEO message and Annotation Item number 115 from the dropdown as shown above and hit the submit button.
5. You have now successfully inserted an annotation as follows:-

6. In order to run the annotation widget click on Run in the topmost right corner as follows:-

7. For this example, we select Run as HTML.
8. Click on HTML which will open the following dialog box:-

9. As the chart has no parameters, just click on Send.
10.   The following image will be generated in HTML.

11.   You can change the template format from the Birt Templates as follows:-

Templates	Birt Template	
NONE ▼	LANDSCAPE VIEW ▼	⇄ Parameter Mapping

12.   If you want to save your image you can click on the save

button 💾 at the topmost right corner below admin which will open the following dialog box:-

Save As   ❓ ✖

Selected Column   Datasets

AisReport   **Reports**

          Template

Submit

13.   You can give your own name in selected column, and select format as Report/Template and press submit button to perform save operation.

14.   If you want to change the settings of a widget click on ⚙ below Run which will open the following dialog box:-

Setting Table   ❓ ✖

Name	Width	Height
Annotation	500	500

☑ Visibility

Submit   Cancel

15.   Here you can change name, width, height and visibility of your annotation.

16.   Similarly press 🗑 in order to delete the annotation widget.

Text

- In order to insert text in your adhoc report follow the following steps:-
- You can insert a text below another widget like table.
- You can also create text on a new page as follows:-

Text	⊹ ▴ ⬆ ⚙ 🗑
Normal ⇕ **B** *I* <u>U</u> ~~S~~ A 🖌 🔗 🖼 🖽 ƒₓ ≡ ⧉ ≣ ⫤ ⫣ X₂ X²	
Insert text here …	
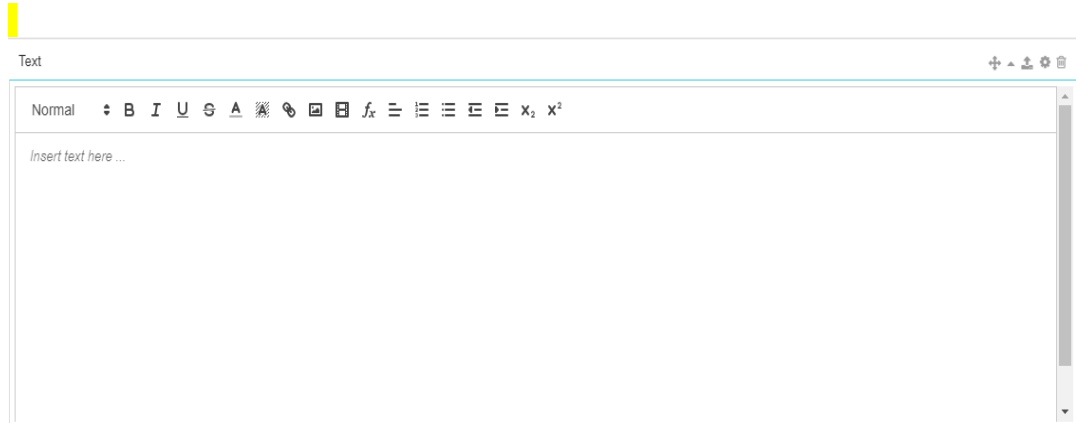
- Now follow the following steps:-

1. Drag and drop the text to empty area as shown above.
2. Now you can insert text in the empty area and perform formatting as follows:-

Heading 3 ⇕ **B** *I* <u>U</u> ~~S~~ A 🖌 🔗 🖼 🖽 ƒₓ ≡ ⧉ ≣ ⫤ ⫣ X₂ X²

~~Hello!!! Welcome to Active Intelligence Server~~

αⁱ Active Intelligence

3. You can link your text to a specific URL by selecting the text and clicking as follows:-

4. You can also insert an image or video by clicking on or respectively.

5. You can insert a formula in your report by clicking on as follows:-
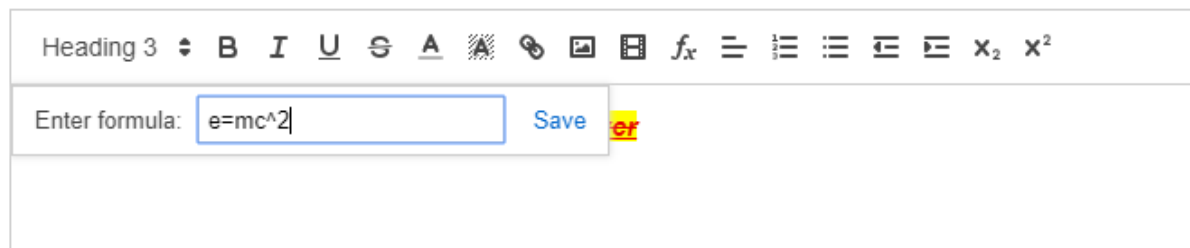
6. Similarly, you can perform alignment, indentation, superscript and subscript using text.
7. In order to run the text widget click on Run in the topmost right corner as follows:-
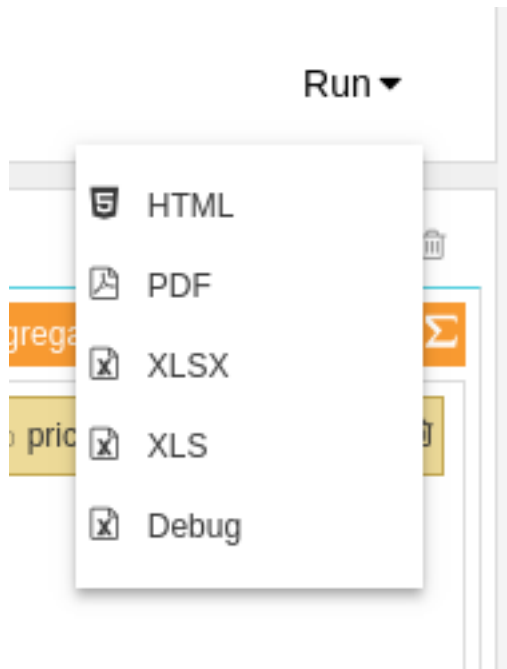
1. For this example, we select Run as HTML.
2. Click on HTML which will open the following dialog box:-

Bind Parameter

Parameters marked with * are required.
ReportTitle *   Report on the fly

Send   Cancel
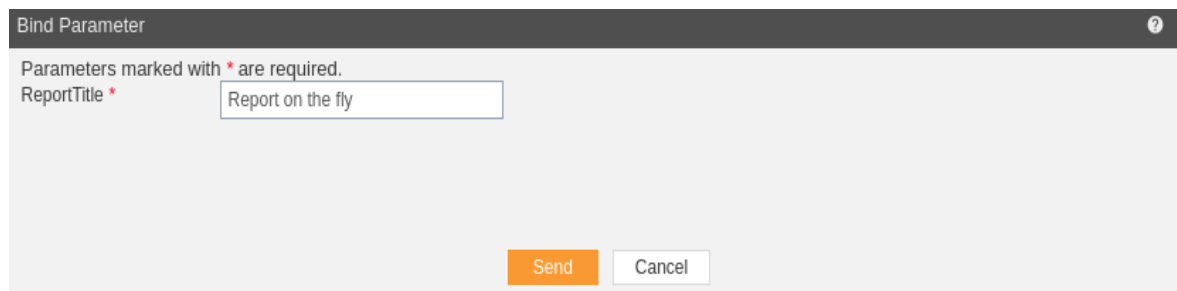
3. As the text has no parameters, just click on Send.
4. The following text will be generated in HTML.

21 You can change the template format from the Birt Templates as follows:-
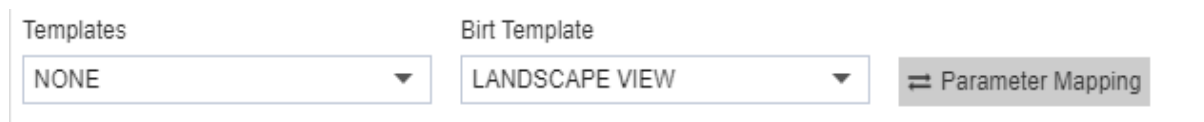
Templates   Birt Template
NONE   ▼   LANDSCAPE VIEW   ▼   ⇄ Parameter Mapping

22 If you want to save your image you can click on the save button at the topmost right corner below admin which will open the following dialog box:-
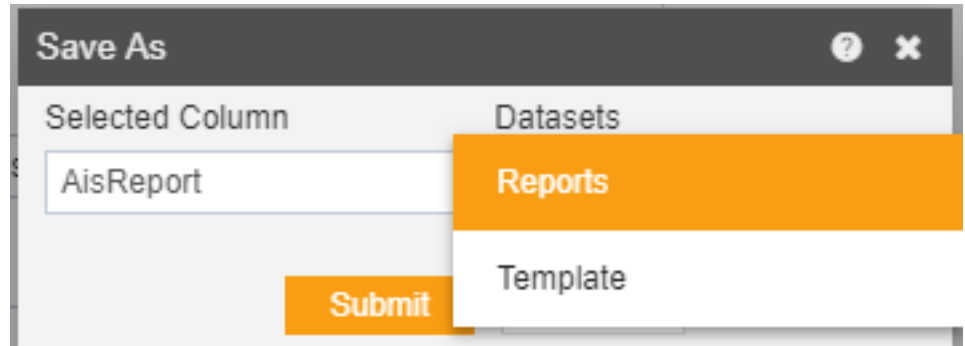
23 You can give your own name in selected column, and select format as Report/Template and press submit button to perform save operation.
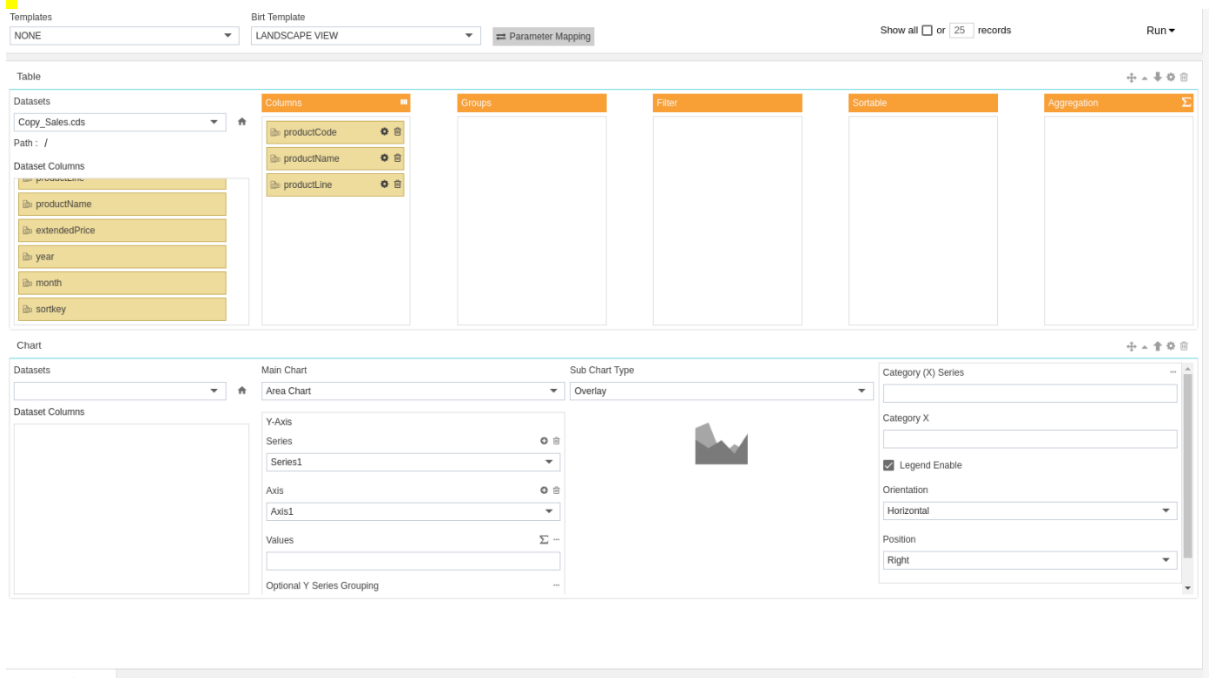
24 If you want to change the settings of a widget click on below Run which will open the following dialog box:-
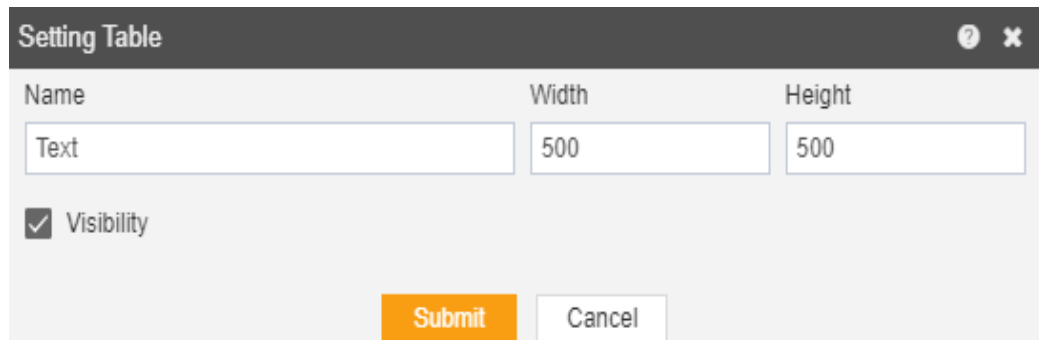
25 Here you can change name, width, height and visibility of your text.
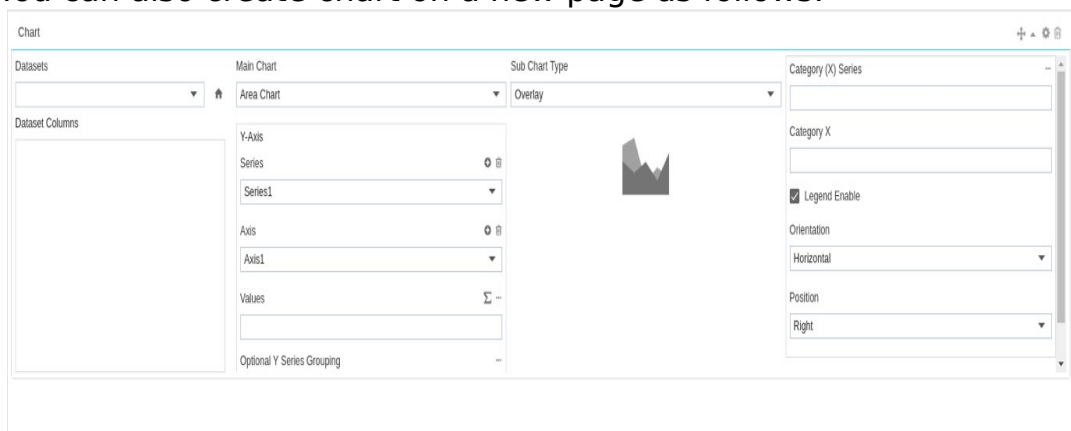
26 Similarly press in order to delete the text widget.

Pre-defined
- There are also some predefined components provided by the AIV application inside the component library of the Pre-defined tab on create adhoc page.
- These components are as follows:-
  - Cover Page
  - Performance Report
- In order to add predefined components to your adhoc report perform the following steps:-

o Drag and drop the performance report to empty area as shown below:-
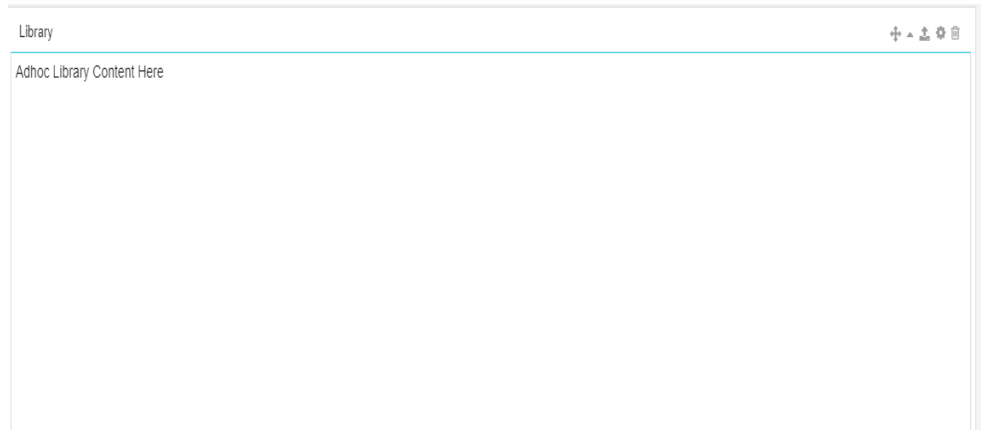
2 You have now successfully inserted a performance report in your adhoc report.
3 In order to run the performance report click on Run in the topmost right corner as follows:-
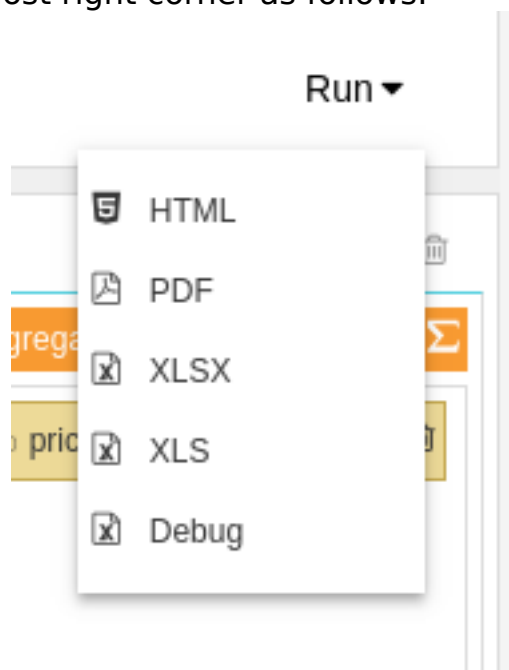
5. For this example, we select Run as HTML.
6. Click on HTML which will open the following dialog box:-
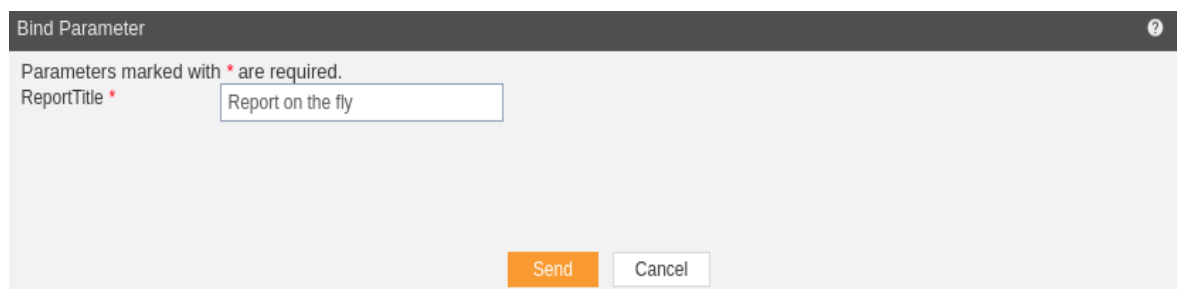
7. As the chart has no parameters, just click on Send.
8. The following performance report will be generated in HTML.
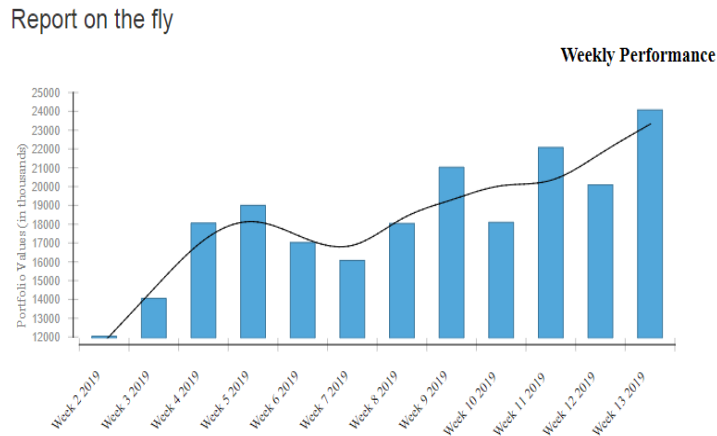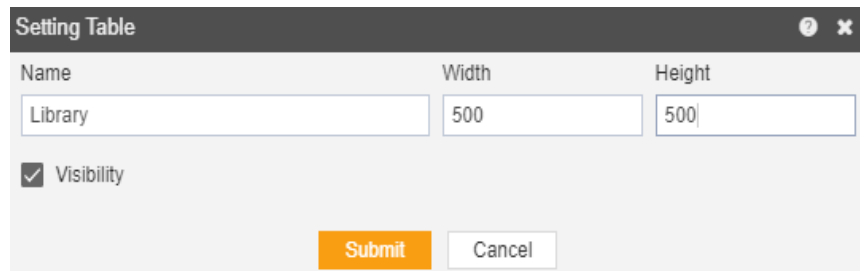
Report on the fly

Weekly Performance

9. You can change the template format from the Birt Templates as follows:-

Templates

NONE

Birt Template

LANDSCAPE VIEW

⇄ Parameter Mapping

10.   If you want to save your image you can click on the save

button 🖫 at the topmost right corner below admin which will open the following dialog box:-

Save As

Selected Column

AisReport

Datasets

Reports
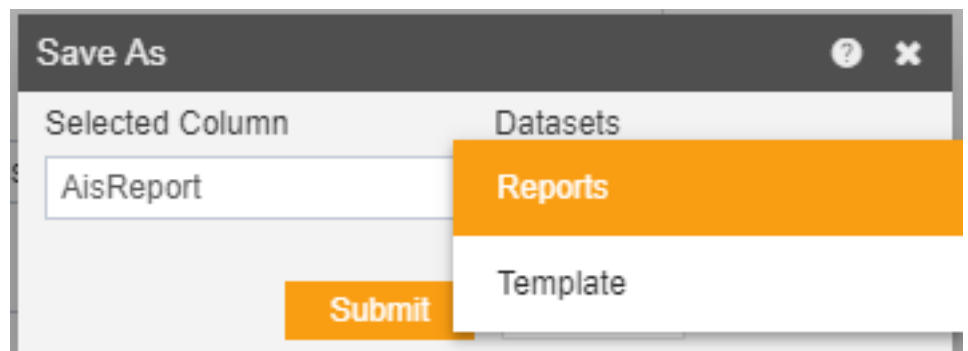
Template

Submit

11.   You can give your own name in selected column, and select format as Report/Template and press submit button to perform save operation.

12.   If you want to change the settings of a widget click on ⚙ below Run which will open the following dialog box:-
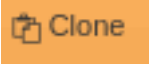
13. Here you can change name, width, height and visibility of your library.

14. Similarly press 🗑 in order to delete the performance report.

Clone
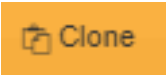
- Clone enable user to make a new instance/copy of the selected file.
- To Clone Adhoc Report, follow these steps: (Only users with Adhoc privilege have access to this section)
- There are two ways in which user can clone a report:-

  o Right click and select 📋 Clone from the context menu as shown in the figure below:
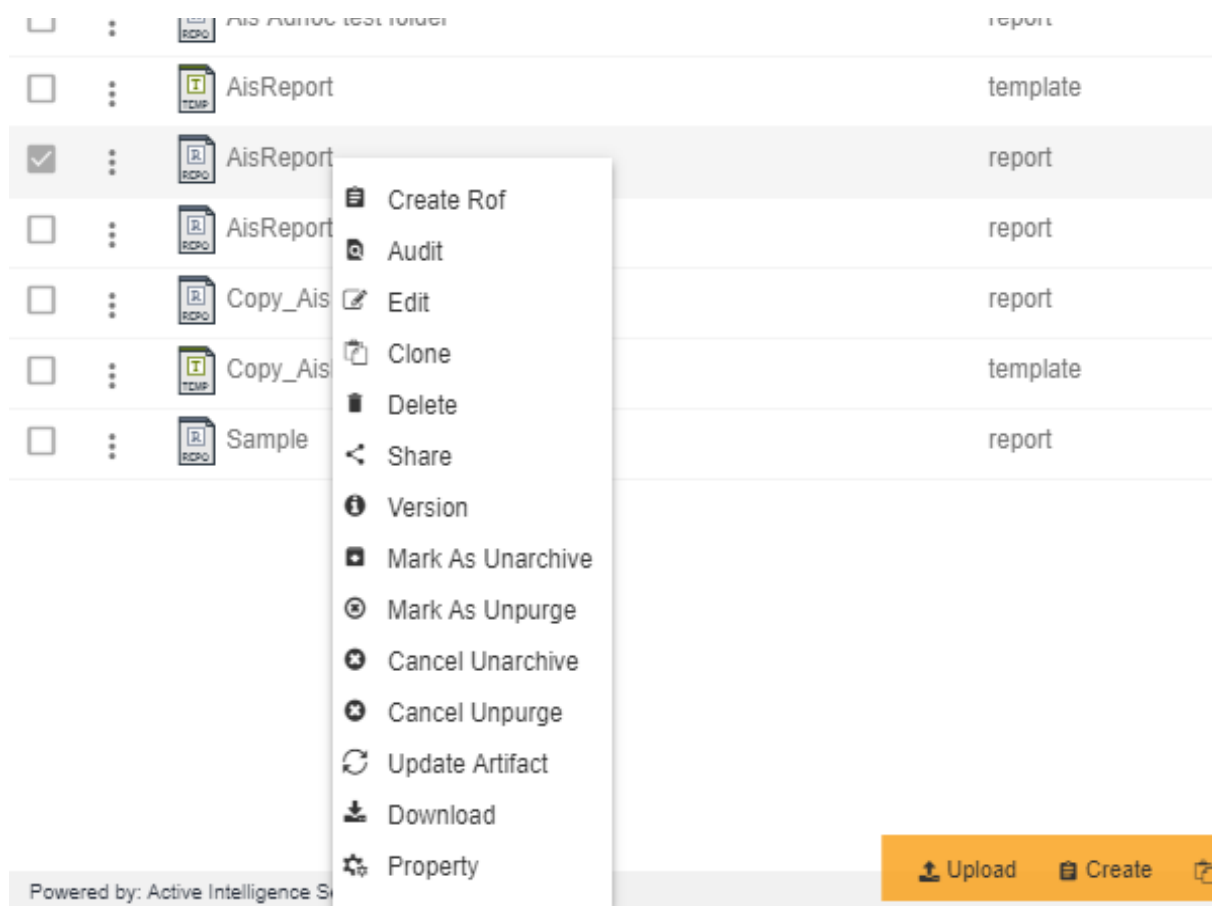
1. select from the footer menu bar.
    a. Using any of the above mentioned methods when you clone the merge report following dialog box will appear:
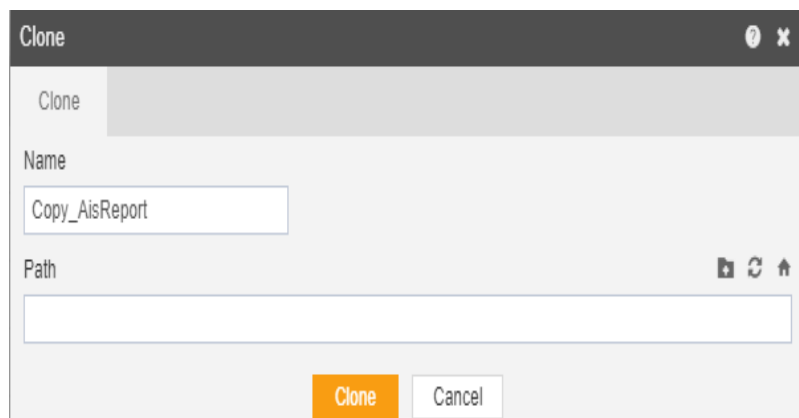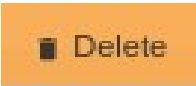
- User have option to update the File Name
- You can also specify optional path where your cloned report will be saved.

- Finally click on button to finish creating a copy of selected Adhoc Report.
- In this manner, you can Clone an Adhoc report.

Delete

- There are two ways in which a user can delete an adhoc report in the AIV application:-

2. By clicking on the delete icon located at the bottom most toolbar.
3. By right clicking the report you want to delete. We will use Copy_AIVreport.pdf report in this tutorial for the purpose of understanding.
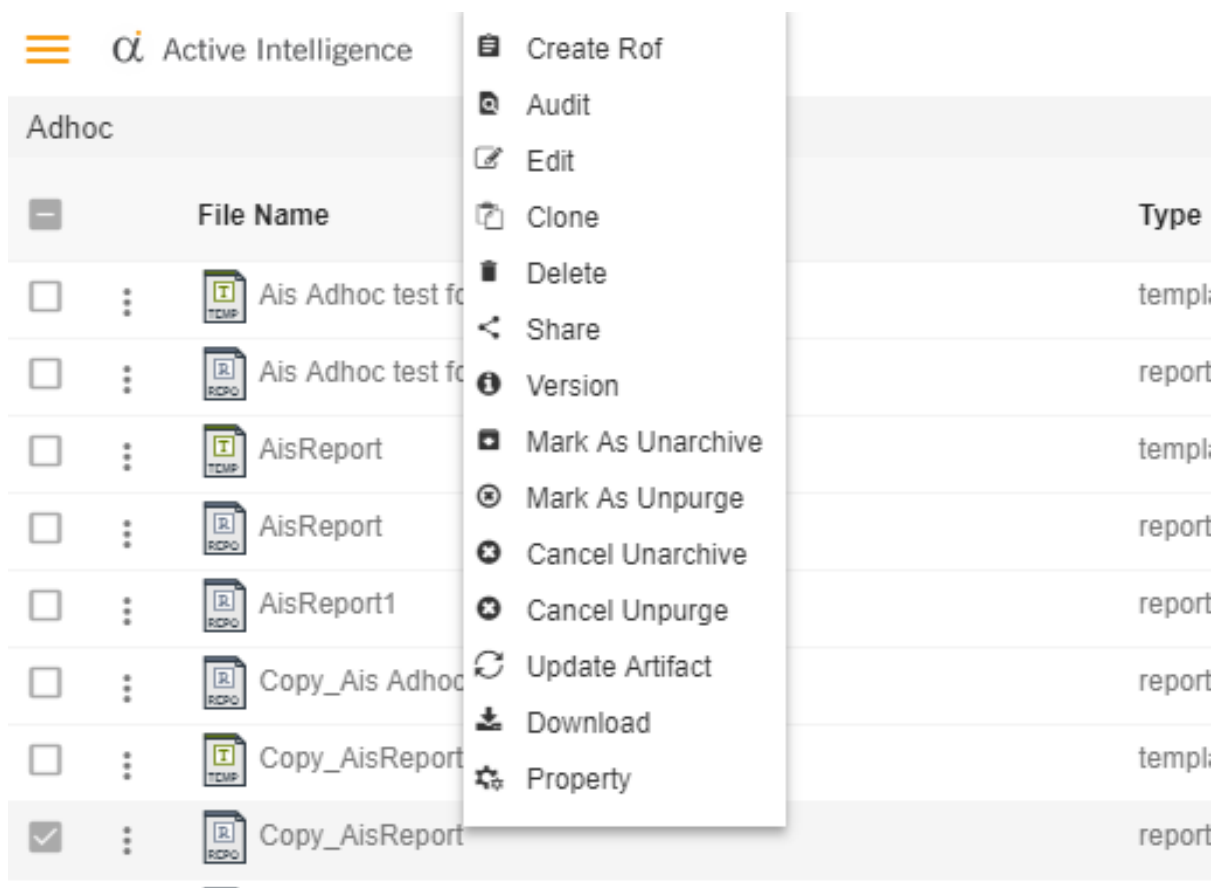
- Finally press on delete after selecting the report using any one of the above mentioned methods which will open the dialog box as shown below:-
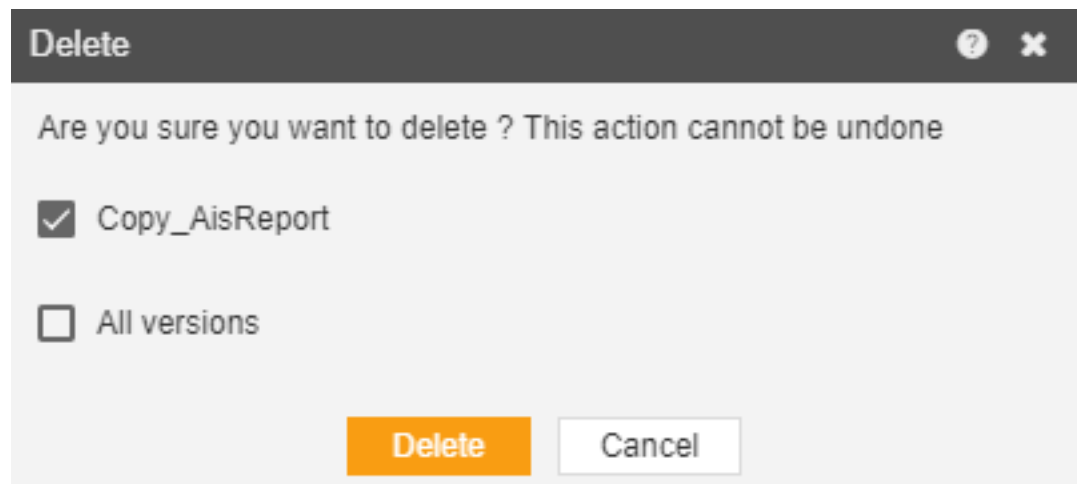
- For a report which has multiple versions, you can select whether you want to delete current version or all versions of that report.
- The report will be deleted and a message will be displayed report deleted successfully.
- In a similar manner, you can also perform the delete operation on the folders selecting the folder you desire to move and choosing the move icon from the
- toolbar, or by right-clicking the folder and selecting the move option from the elapses shown.

Share

- There are two ways in which a user can share an adhoc report in the AIV application:-
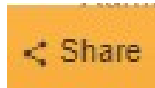
  1. By clicking on the share icon located at the bottom most toolbar.
  2. By right clicking the adhoc report you want to share. We will use **Aisreport.report** report in this tutorial for the purpose of understanding.

			Ais Adhoc test folder		report
☐	⋮	AisReport			template
☑	⋮	AisReport			report
☐	⋮	AisReport			report
☐	⋮	Copy_Ais			report
☐	⋮	Copy_Ais			template
☐	⋮	Sample			report

Create Rof
Audit
Edit
Clone
Delete
Share
Version
Mark As Unarchive
Mark As Unpurge
Cancel Unarchive
Cancel Unpurge
Update Artifact
Download
Property

Powered by: Active Intelligence S

⬆ Upload   🗂 Create
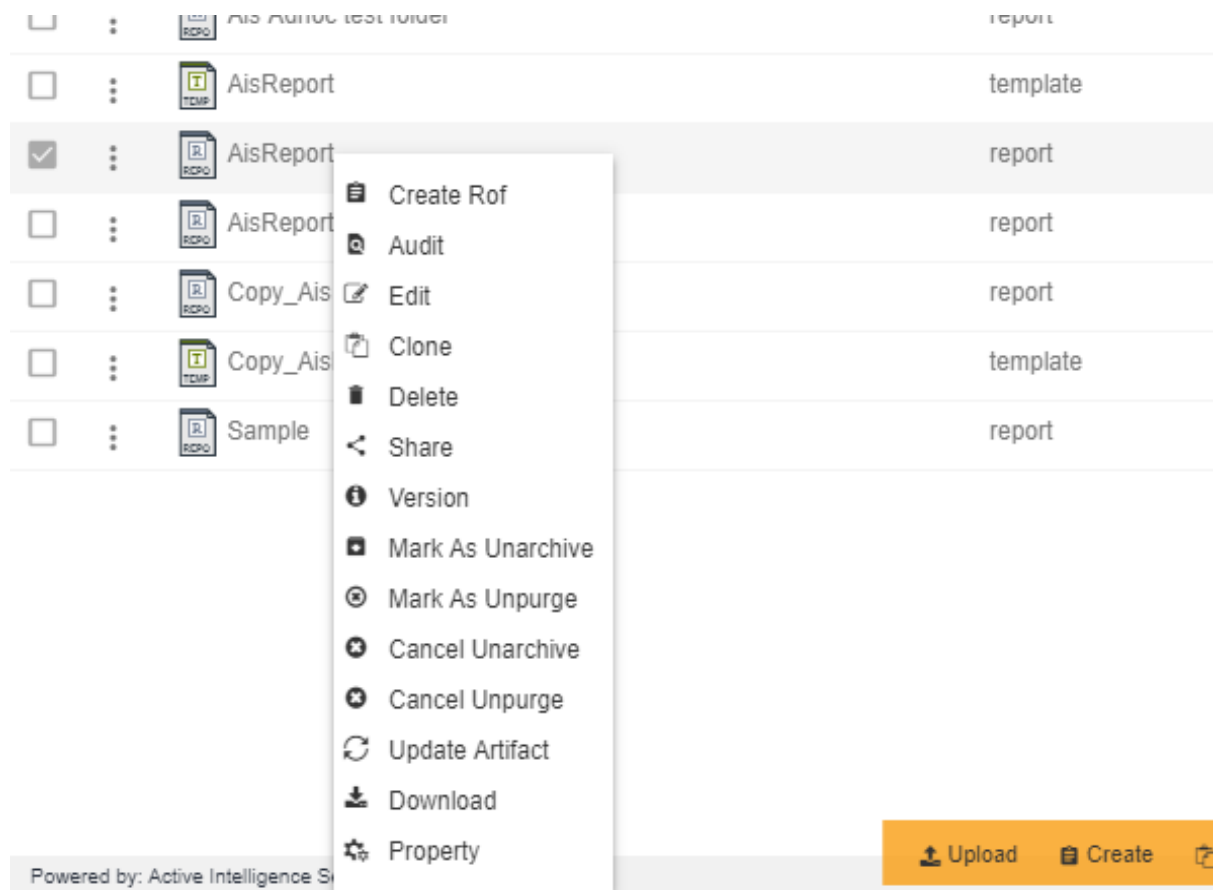
- Now perform the following steps in order to share the report Merge:
  1. Click on Share using one of the methods mentioned above which will open the following popup..
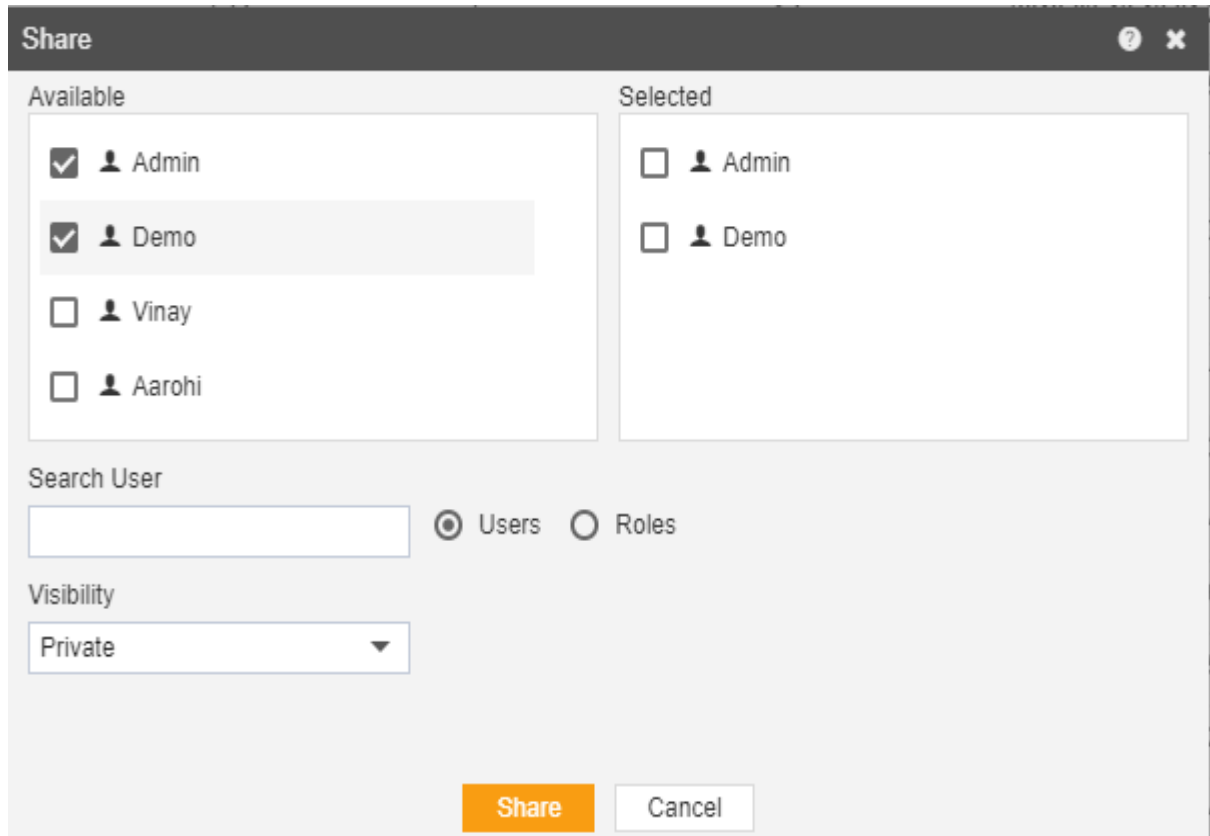
2. The user can select other users with whom the report will shared from the list of available users or search them in the search user bar.

2. In the similar manner, user can select different user roles with whom the report will be shared .
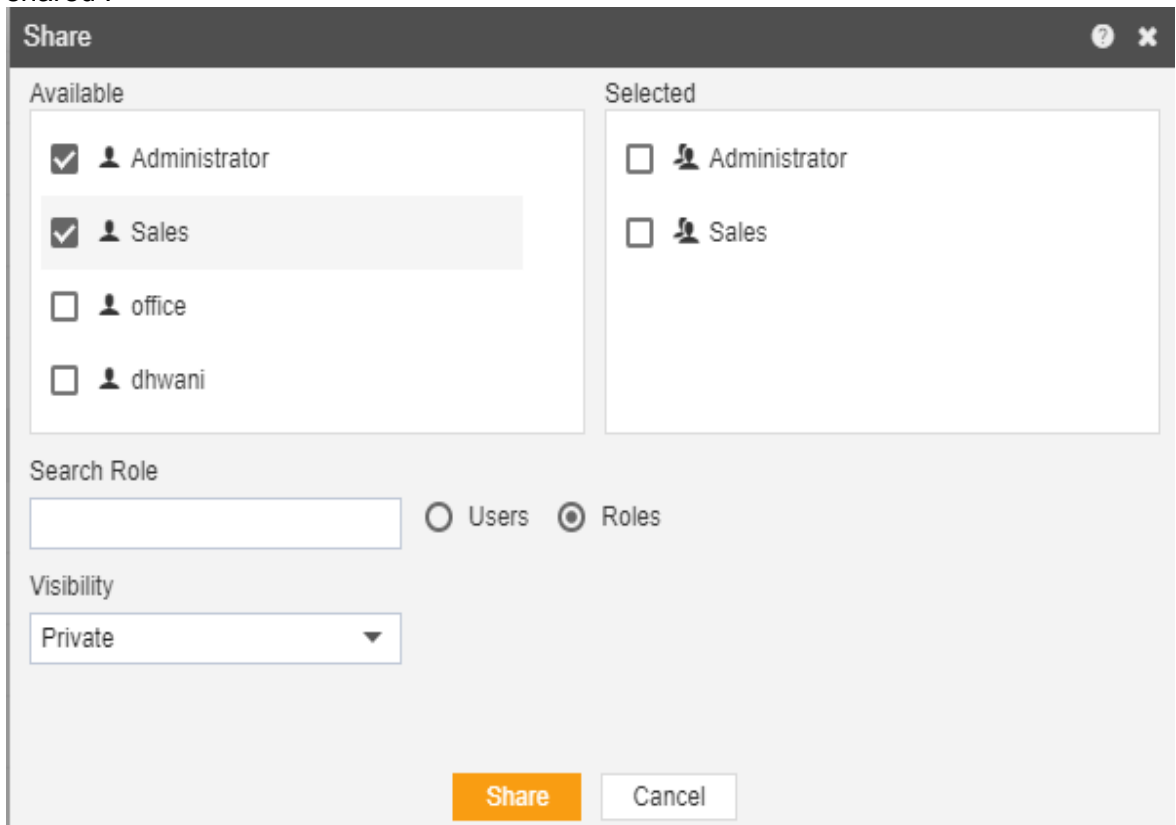
4. The user can also search for roles in the Search Role bar.
4. Visibility is used to mention who all can view the report and is of following three types:-

> • **Private:-** It means only the current user can view the file.
> • **Internal:-** It means all the users within the organization can view the file.
> • **Public:-** It means anyone can view the file.

6. The user can select the visibility from the dropdown menu as shown above. Select Internal visibility for our reference.

6. In case of any further help, the user can click on the icon to access the AIV help documents.
6. Finally, in order to move the report, click on the Move button.
6. If the user is not satisfied and wants to cancel the share request, he can do this by clicking on cancel button next to share or by clicking on button next to the icon.
6. As the report is shared with user named Demo, the report will be visible in the Reports section when login is performed with the credentials of user Demo as follows:-
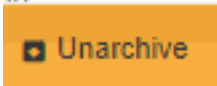
> • In a similar manner, you can also perform the share operation on the folders selecting the folder you desire to share and choosing the share icon from the toolbar, or by right-clicking the folder and selecting the share option from the elapses shown.

Unarchive

> • The main purpose of unarchive in an AIV application is to enable the user to save some of his important files from being archived.
> • Usually, each type of file is assigned to be archived after certain number of days by the Administrator, after which the file goes to the Archive mode.
> • Once a file is marked as unarchive, then it will not get deleted when the cycle for archive runs in the AIV application.
> • In order to change the settings of the file to be archived/unarchived you need to contact the Administrator.

To Unarchive file and folders follow these steps:
1. Select the file or folders you want to Mark as Unarchive . (Note: multiple file and folders or combination of file and folders can be selected).

2. Right click and and select the **Unarchive** button from the context menu or directly from the bottom menu as shown in the image below:

- Here AIVreport.report is marked as unarchive and hence it will not get deleted when all other adhoc report files are archived.
- You can check the archive status of the file by clicking on **Property** as mentioned in the above figure.

- The Is Archivable property of AIVreport.report is False which means this file will not be archived when the cycle for Archive runs.
- In order to run archive jobs, go to the Requests of the Request section.

- Click on the Archive Job in order to perform the Archive which will open the following dialog box.

- Click on **Run Jobs** in order to run the Archive Jobs. The detailed description regarding the same will be given in the Requests section of the AIV application.
- Only the users with administrator rights can run the archive jobs.

- The administrator user can Login to Archive mode to see the details of all the files that have been archived as follow

- After logging in, following screen will be displayed which shows all the Reports which have been archived.

		File Name	Type	Full Path	Owner	Last Updated	Version	Options
☐	⋮	📁 aarohi_report	folder	/	Admin	2019-03-11 14:49:12 IST	1	
☐	⋮	📁 explain_copy	folder	/	Admin	2019-03-18 16:42:08 IST	1	
☐	⋮	📁 explain_move	folder	/	Admin	2019-03-18 17:49:41 IST	1	
☐	⋮	📁 new report	folder	/	Admin	2019-03-12 17:12:03 IST	1	
☐	⋮	📁 New Root	folder	/	Admin	2019-03-09 10:39:06 IST	1	
☐	⋮	📁 Output	folder	/	Admin	2019-03-13 13:01:26 IST	1	
☐	⋮	📁 Templates	folder	/	Admin	2019-02-26 18:28:56 IST	1	
☐	⋮	📁 test_report	folder	/	Admin	2019-03-18 16:38:11 IST	1	
☐	⋮	📁 test_share	folder	/	Aarohi	2019-03-11 19:01:31 IST	1	
☐	⋮	📄 ProductList	pdf	/	Admin	2019-03-13 10:20:30 IST	1	

- You can cancel the unarchive by right clicking the report and selecting cancel unarchive:

- Now check properties to see that Is Archivable is true:-

Unpurged
- The main purpose of unpurged in an AIV application is to enable the user to save some of his important files from being deleted permanently.

- Usually, each type of file is assigned to be purged after certain number of days by the Administrator, after which the file gets deleted permanently.
- Once a file is marked as unpurge, then it will not get deleted when the cycle for purge runs in the AIV application.
- In order to change the settings of the file to be purged/unpurged you need to contact the Administrator.

To Unpurge file and folders follow these steps:
1. Select the file or folders you want to Mark as Unpurge . (Note: multiple file and folders or combination of file and folders can be selected).

2. Right click and and select the ⊗ Unpurge button from the context menu or directly from the bottom menu as shown in the image below:

- Here AIVreport.report is marked as unpurge and hence it will not get deleted when all other pdf files are purged.
- You can check the purge status of the file by clicking on ⚙ Property as mentioned in the above figure.

- The Is Purgable property of AIVreport.report is False which means this file will not be archived when the cycle for Purge runs.
- In order to run purge jobs, go to the Requests of the Request section.

- Click on the Purge Job in order to perform the Archive which will open the following dialog box.

- Click on **Run Jobs** in order to run the Purge Jobs. The detailed description regarding the same will be given in the Requests section of the AIV application.
- Only the users with administrator rights can run the archive jobs.
- The administrator user can Login to Archive mode to see the details of all the files that have been purged as follow

α^i

Hi, Welcome to **Active Intelligence**

| 👤 | Admin |
| 👁 | •••••••• |

Login

Login to Archive

HELP   VIDEOS

- After logging in, following screen will be displayed which shows all the Reports which have been purged.

		File Name	Type	Full Path	Owner	Last Updated	Version	Options
☐	⋮	aarohi_report	folder	/	Admin	2019-03-11 14:49:12 IST	1	
☐	⋮	explain_copy	folder	/	Admin	2019-03-18 16:42:08 IST	1	
☐	⋮	explain_move	folder	/	Admin	2019-03-18 17:49:41 IST	1	
☐	⋮	new report	folder	/	Admin	2019-03-12 17:12:03 IST	1	
☐	⋮	New Root	folder	/	Admin	2019-03-09 10:39:06 IST	1	
☐	⋮	Output	folder	/	Admin	2019-03-13 13:01:26 IST	1	
☐	⋮	Templates	folder	/	Admin	2019-02-26 18:28:56 IST	1	
☐	⋮	test_report	folder	/	Admin	2019-03-18 16:38:11 IST	1	
☐	⋮	test_share	folder	/	Aarohi	2019-03-11 19:01:31 IST	1	
☐	⋮	ProductList	pdf	/	Admin	2019-03-13 10:20:30 IST	1	

- You can cancel the unpurge by right clicking the report and selecting cancel unarchive:

	File Name	Type
☐		folder
☐		folder
☐		folder
☐		folder
☐		folder
☐		folder
☐		folder
☐		folder
☐		rptdesign
☐		rptdesign
☑	⋮ Employees	pdf
☐	⋮ Employees	rptdesign

Context menu:
- 🖿 Create Folder
- 🔍 Audit
- 📋 Copy
- ✂ Move
- 🗑 Delete
- < Share
- ⓘ Version
- ⬛ Mark As Unarchive
- ⊛ Mark As Unpurge
- ⊗ Cancel Unarchive
- ⊗ Cancel Unpurge
- ▪ Embed
- ⬇ Download
- ⚙ Property

- Now check properties to see that Is Purgable is true:-

Properties ❓ ✖

General

Name	Description
AisReport	

Owner	VisibilityType
Admin	INT

Default Version	Created On
2	2019-02-26 10:46:28

LastUpdated By	LastUpdated On
Admin	2019-02-26 10:46:28

Is Archivable	Is Purgable
True	True

Submit   Cancel

Audit

Audit shows the actions like when the user created, uploaded or downloaded any particular file.

1. Following image describes the audit option.

Version

Version option shows the number of versions of the selected report as well as the version which user is using.

- Following is the image describing number of versions of selected adhoc report.

Download

User can download the selected alert by clicking download option from context menu.

Property

- Use Properties option of the file and folders for the following:
- To update the Name of the file and folders
- To change the Output Types of the File (Note: only applicable to files)
- To view file and folders Properties such as owner information, last updated by, file created date, archive and purge options and file visibility i.e. (Private, Internal, Public) and much more.
- To view the Property for the file or folder follow the steps below:

1. Select file or folder you wish to see properties for or update the information such as Name or Output Type by selecting **Properties** from the context menu, following dialog box will appear as shown in the image below:

Properties			? ✕

General

Name	Description
AisReport	

Owner	VisibilityType
Admin	INT

Default Version	Created On
2	2019-02-26 10:46:28

LastUpdated By	LastUpdated On
Admin	2019-02-26 10:46:28

Is Archivable	Is Purgable
True	False

Submit   Cancel

2. The Name can be updated (Note: The above image is taken from the Folder Properties,File Properties will have additional tab for Output Type which will enable users to select/unselect the file Output visibility Type i.e pdf, doc, html etc.).

3. Finally click **Submit** button to save the changes to the file Properties, if any.

Shared Resources

Shared Resources contains all the artifacts which are by default shared between all users within the same organization. It is important that all the users within the same organization uses the same network connection and same repository to access the shared files.
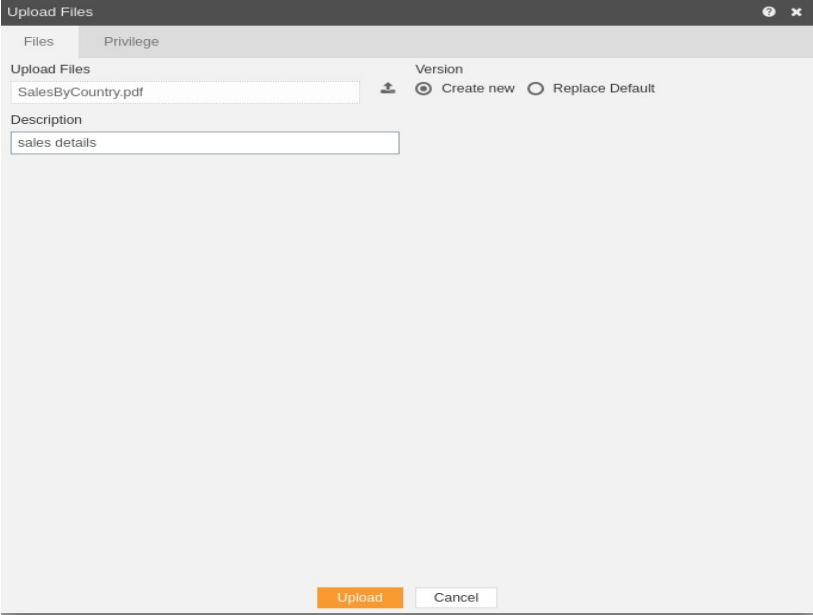
In simple words, **Shared** location in Repository from which the artifacts are accessible to all application users. Best practice is to place only files which are going to be used all across the organization i.e. Images, Theme, Data Source etc.

Some of the functionalities offered by Shared Resources are:-
1. Upload
2. Create
3. Copy
4. Move
5. Delete

Upload

- The user can upload the shared resources such as Images, Themes, Datasource, etc. by clicking on the upload icon ⬆ on the toolbar located at the bottom of the Shared Resources page.
- On clicking the icon, following screen will be displayed...

- In the Upload Files section as shown in the figure above, select the upload icon in order to upload your documents from your computer.
- If the document already exists on the AIV application, the user has an option to replace the default report or to create a new report using the version option as depicted above.
- Furthermore, the user can also provide any optional description for reference, in the description text area shown here.

- There is also an option to hide the visibility to certain users using the privileges tab as shown in the figure below:
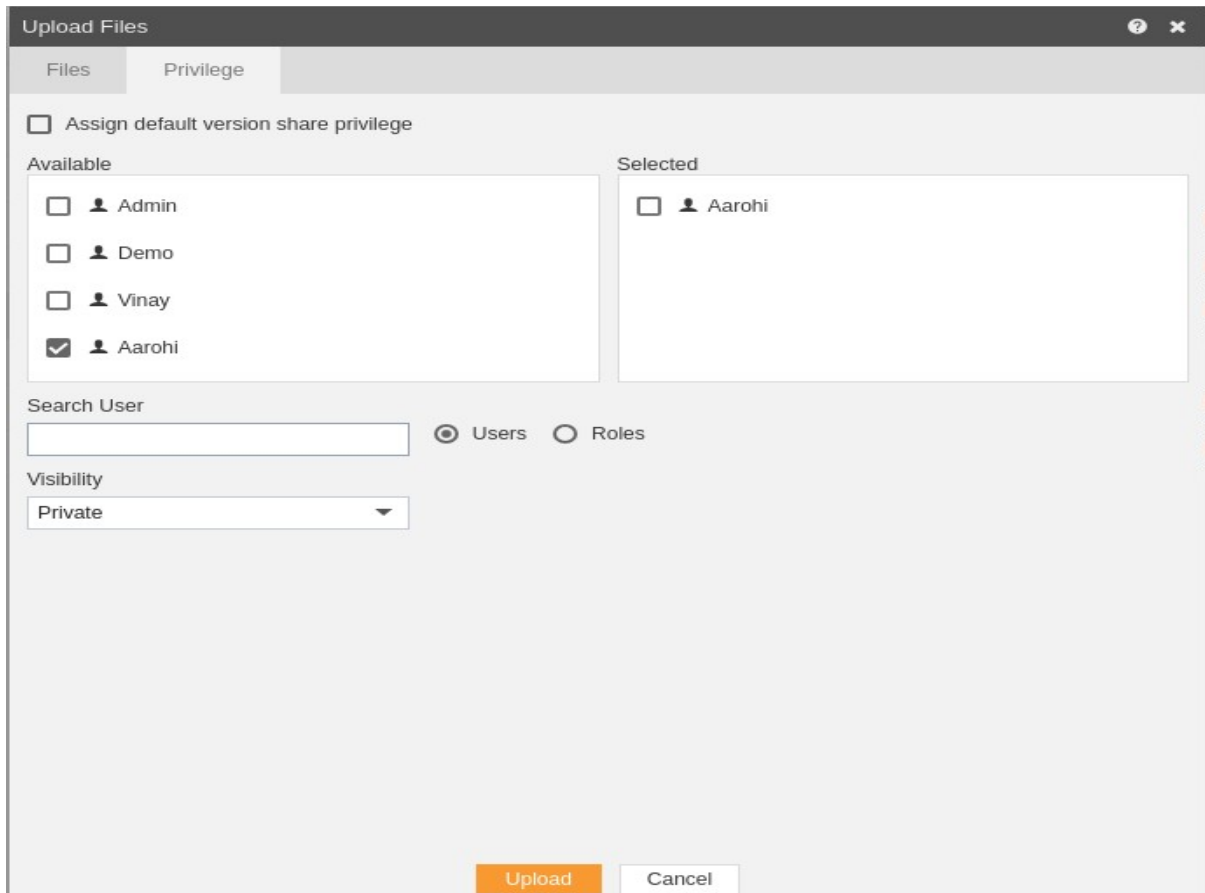
- In case of working with any new version of the document, you can assign the default version share privileges by checking the checkbox. For instance, if there are three versions of same image files and a new version is to be created of that report, than default share privileges can be applied to that image.
- The user can select other users with whom the document will be shared from the list of available users or search them in the search user bar.
- In the similar manner, user can apply privileges to different user roles as follows:-

- Just as in case of users, the user can assign default share privileges to different user roles or can select the roles from the Available list of roles.
- The user can also search for roles in the Search Role bar.
- Visibility is used to mention who all can view the report and is of following three types:-
    1. **Private:-** It means only the current user can view the file.
    2. **Internal:-** It means all the users within the organization can view the file.
    3. **Public:-** It means anyone can view the file.
- The user can select the visibility from the dropdown menu as shown above.
- In case of any further help, the user can click on the 🔘 icon to access the AIV help documents.
- Finally, in order to upload the document, click on the upload button.
- If the user is not satisfied and wants to cancel the upload request, he can do this by clicking on cancel button next to upload or by clicking on ✖ button next to the 🔘 icon.

Create Folder
- There are two ways in which a user can create a new folder in the AIV application.
1. By clicking on the create icon 📁 Create next to the upload icon at the bottommost toolbar.
2. By right clicking on any existing file or folder on the reports page as follows:-
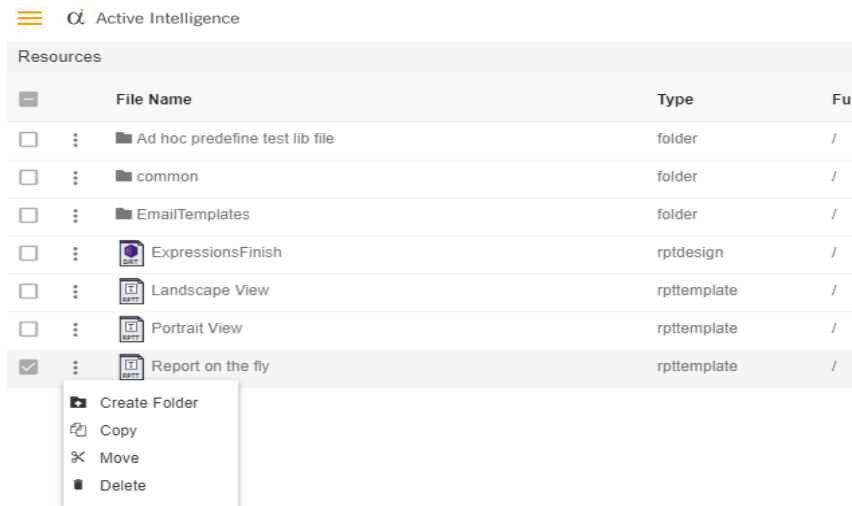
- On clicking on create folder, following popup will be opened:-
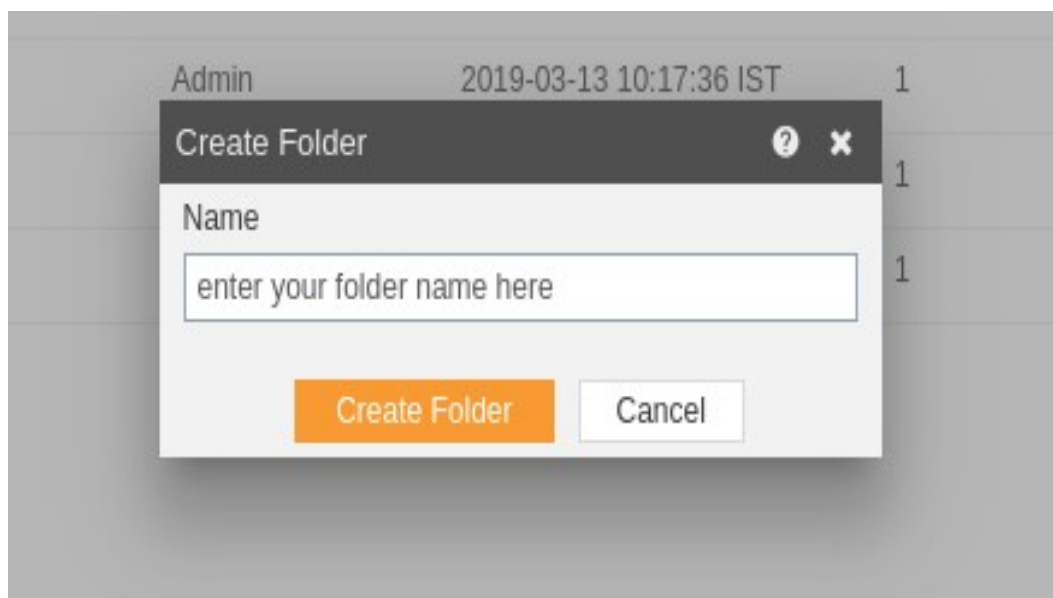
- In case of any further help, the user can click on the icon to access the AIV help documents.
- Enter the name you want to give to your folder in the text area and click on create folder.

- If the user is not satisfied and wants to cancel the create request, he can do this by clicking on cancel button next to upload or by clicking on ✖ button next to the ❓ icon.

Copy

- There are two ways in which a user can copy a resource in the AIV application:-
  1. By clicking on the copy icon 🗐 Copy located at the bottom most toolbar.
  2. By right clicking the resource you want to copy. We will use **Portrait View** rptdesign in this tutorial for the purpose of understanding.
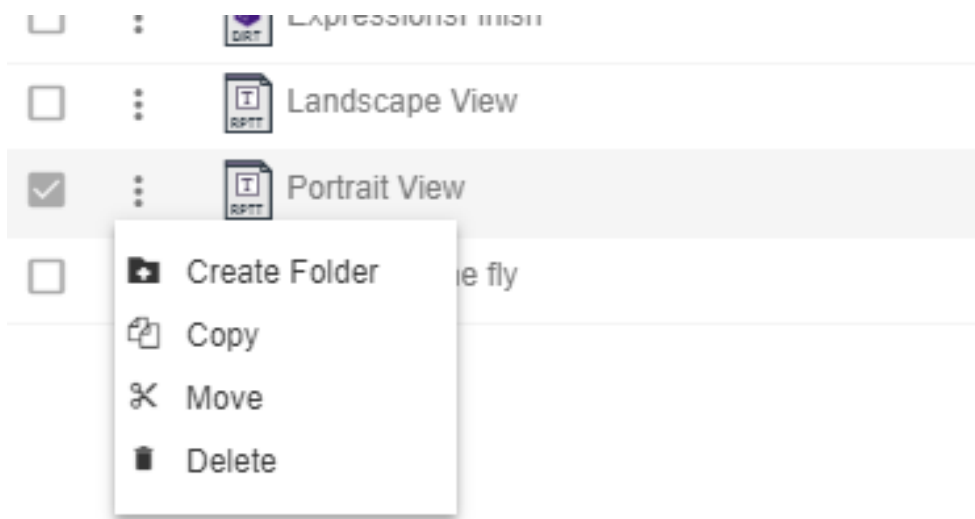
- Now

perform the following steps in order to copy the design Portrait View-
  1. Click on Copy using one of the methods mentioned above which will open the following popup..

2. The will be View.
   own

3. In
   you
   of the
   in the
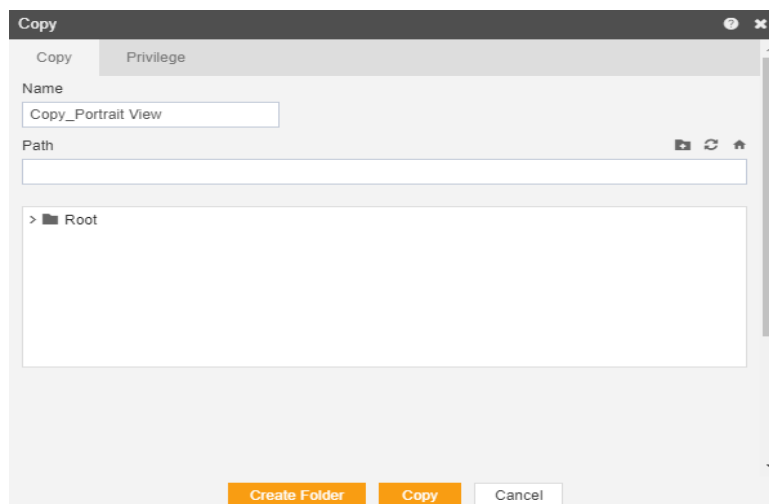
default name Copy_Portrait You can provide your name while copying a design. order to provide copy destination, can select any folders present popup or can

create a new folder by selecting the folder where new folder must be created and clicking on Create Folder as follows:-
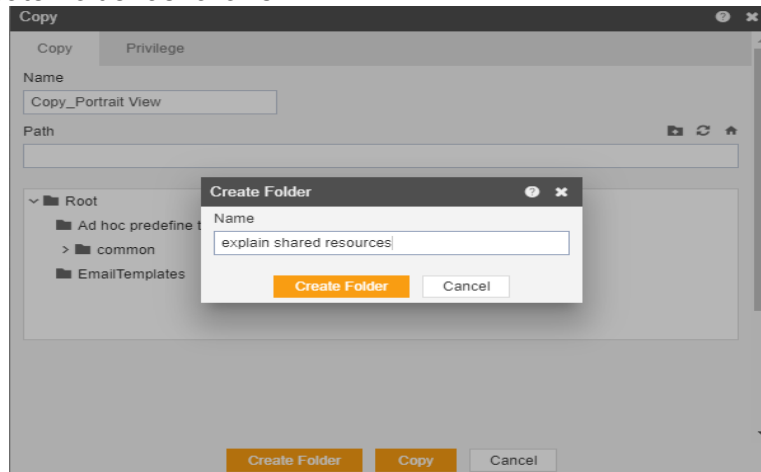
4. Here we have created a folder named explain_copy within root where we will copy our Portrait View report.

4. Select explain_copy from the list shown below:-
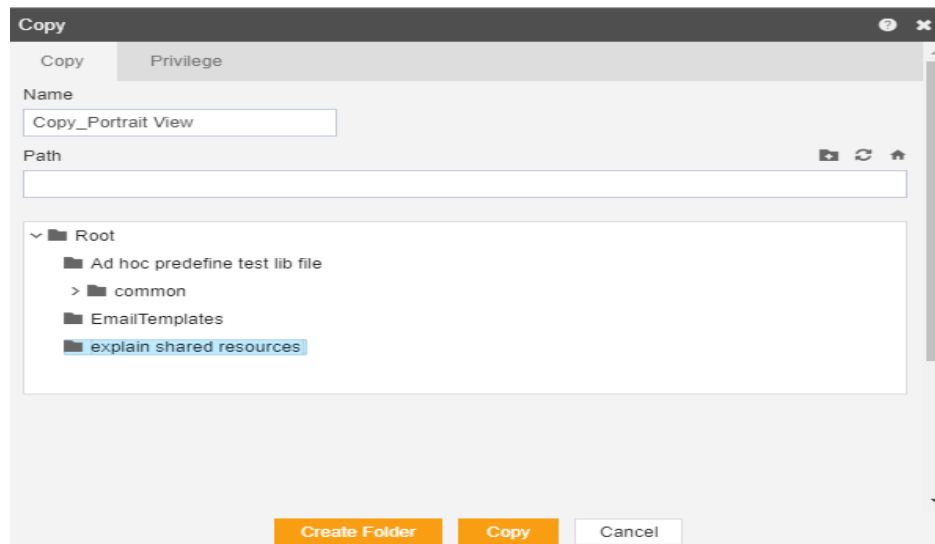
6. In order to assign privileges to the report, click on the privileges tab next to the copy tab. By default, Copy current privileges and visibility checkbox will be checked which will retain the same privileges and visibility of the original report in the copied version.

7. If you want to assign privileges uncheck Copy current privileges and visibility checkbox.

8. The user can select other users with whom the copied report will shared from the list of available users or search them in the search user bar.

9. In the similar manner, user can apply privileges to different user roles as follows:-

10. The user can also search for roles in the Search Role bar.
11. Visibility is used to mention who all can view the report and is of following three types:-

- **<u>Private:-</u>** It means only the current user can view the file.
- **<u>Internal:-</u>** It means all the users within the organization can view the file.
- **<u>Public:-</u>** It means anyone can view the file.

12. The user can select the visibility from the dropdown menu as shown above.
12. In case of any further help, the user can click on the 🛈 icon to access the AIV help documents.
12. Finally, in order to copy the design, click on the Copy button.
12. If the user is not satisfied and wants to cancel the copy request, he can do this by clicking on cancel button next to copy or by clicking on ✖ button next to the 🛈 icon.
12. You can see the Copy_Portrait View appears in the explain shared resources folder by opening it.

In a similar manner, you can also perform the copy operation on the folders selecting the folder you desire to copy and choosing the copy icon from the toolbar, or by right-clicking the folder and selecting the copy option from the elapses shown.

Move

- There are two ways in which a user can move a design in the AIV application:-

- By clicking on the move icon located at the bottom most toolbar.
- By right clicking the design you want to move. We will use Portrait View report in this tutorial for the purpose of understanding.
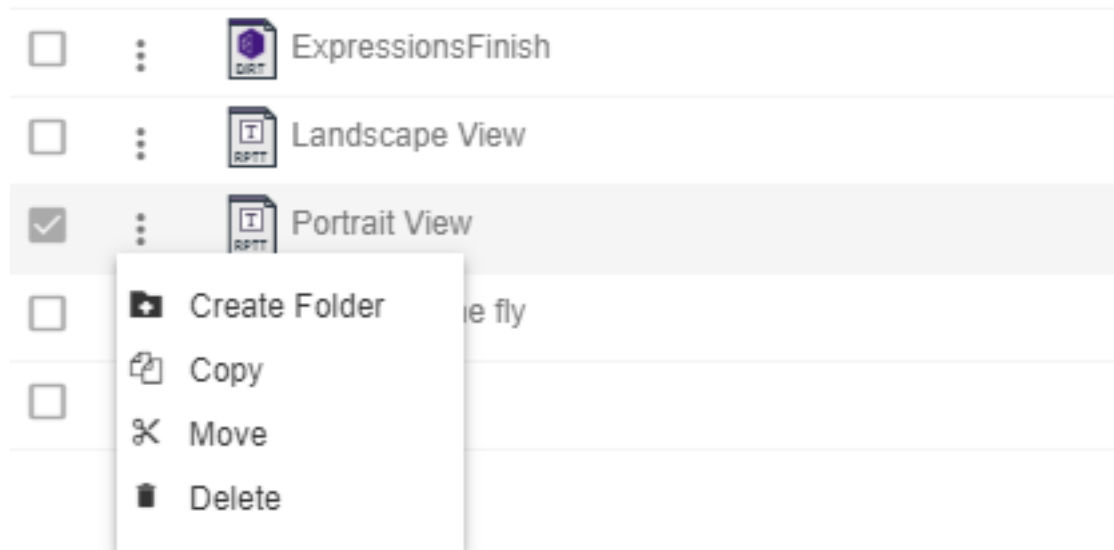
Now perform the following steps in order to move the report Employee List:-

1.   Click on Move using one of the methods mentioned above which will open the following popup.-
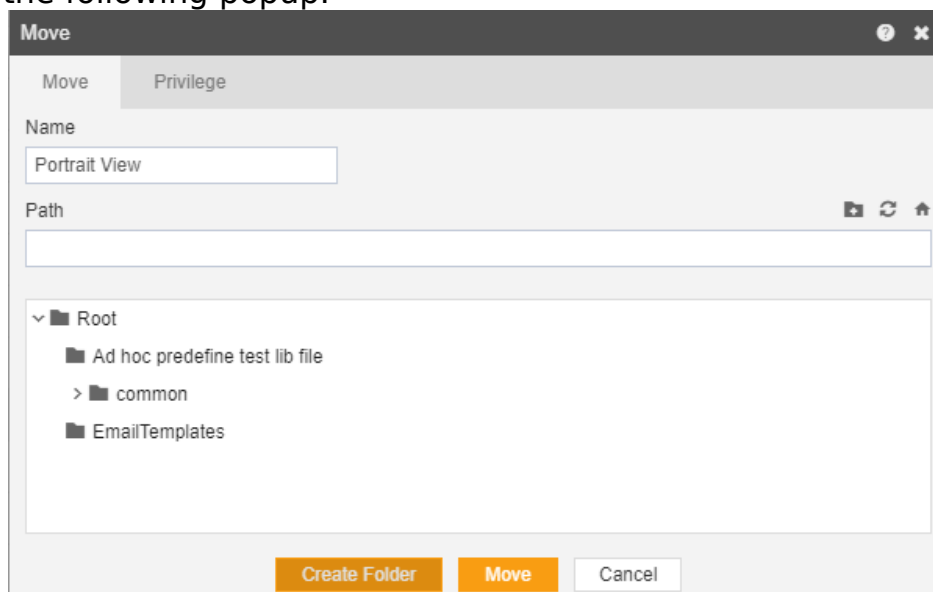
2.

3.   The default name will be Portrait View. You can provide your own name while moving a report.

4.   In order to provide move destination, you can select any of the folders present in the popup or can create a new folder by selecting the folder where new folder must be created and clicking on Create Folder as follows:-
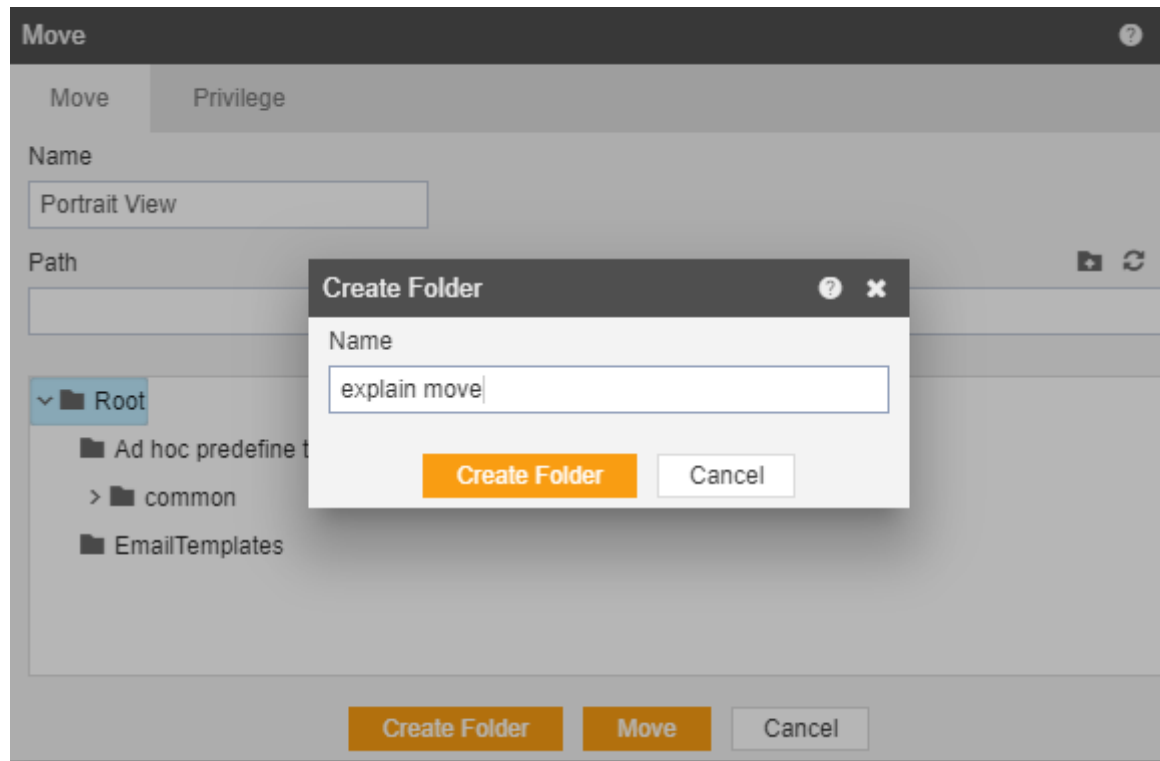
1.   Select explain move from the list shown below:-

2.   In order to assign privileges to the report, click on the privileges tab
next to the move tab. By default, Copy current privileges and visibility
checkbox will be checked which will retain the same privileges and
visibility of the original report in the moved version.
3.   If you want to assign privileges uncheck Copy current privileges and
visibility checkbox.
4.   The user can select other users with whom the moved report will
shared from the list of available users or search them in the search user
bar.
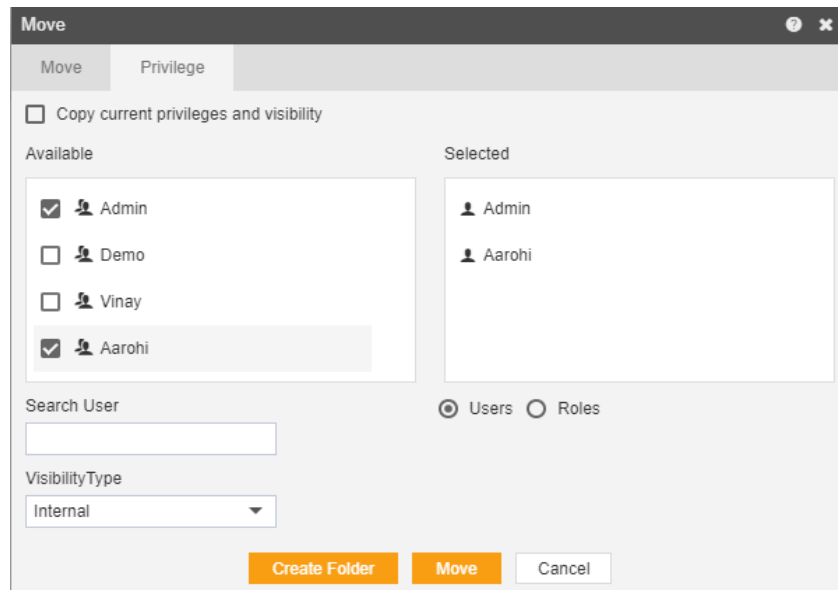
8 In the similar manner, user can apply privileges to different user roles as follows:-
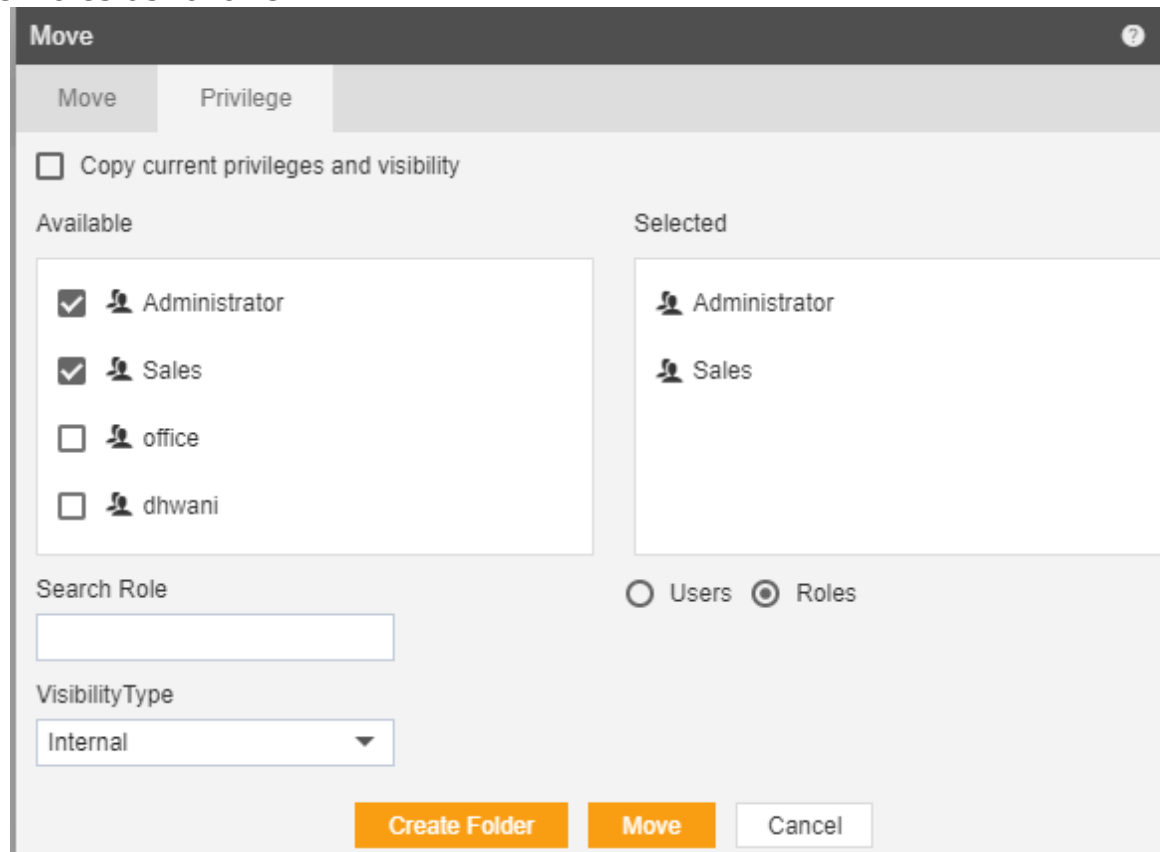
9 The user can also search for roles in the Search Role bar.

5.   Visibility is used to mention who all can view the report and is of following three types:-

6.   Private:- It means only the current user can view the file.

7.   Internal:- It means all the users within the organization can view the file.

10 Public:- It means anyone can view the file.

11 The user can select the visibility from the dropdown menu as shown above.

5. In case of any further help, the user can click on the icon to access the AIV help documents.
6. Finally, in order to move the report, click on the Move button.
7. If the user is not satisfied and wants to cancel the move request, he can do this by clicking on cancel button next to move or by clicking on button next to the icon.
8. As the report is moved, it will removed from the Reports page and will be added to the explain_moved folder

9. In a similar manner, you can also perform the move operation on the folders selecting the folder you desire to move and choosing the move icon from the toolbar, or by right-clicking the folder and selecting the move option from the elapses shown.

Delete

- There are two ways in which a user can delete a report in the AIV application:-

    1 By clicking on the delete icon located at the bottom most toolbar.
    2 By right clicking the report you want to delete. We will use Sample.report report in this tutorial for the purpose of understanding.
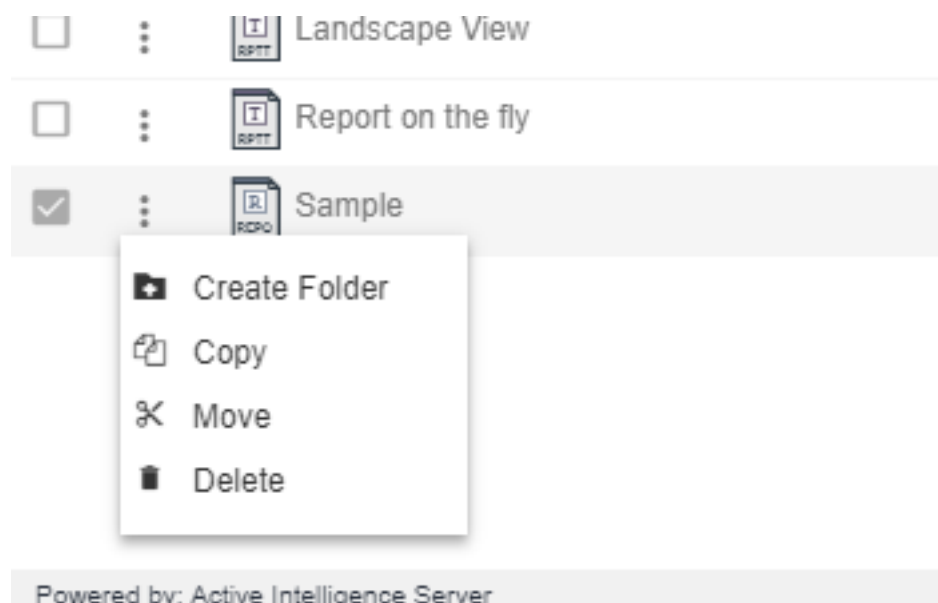
- Finally press on delete after selecting the document using any one of the above mentioned methods which will open following dialog box:-
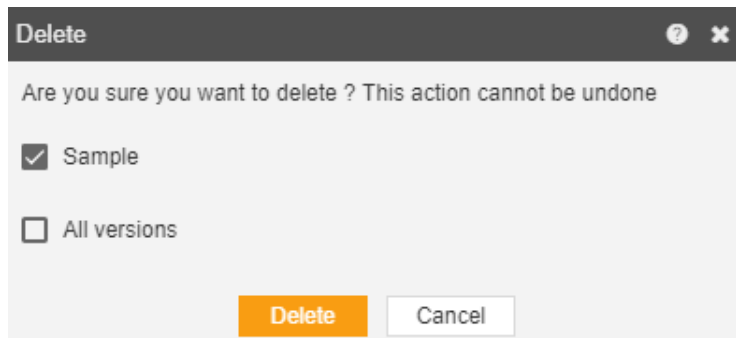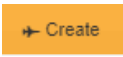
- For a resource with multiple versions, you can select whether you want to delete current version or all versions of specified resource.
- The report will be deleted and a message will be displayed report deleted successfully.
- In a similar manner, you can also perform the delete operation on the folders selecting the folder you desire to move and choosing the move icon from the
- toolbar, or by right-clicking the folder and selecting the move option from the elapses shown.

Quick Run
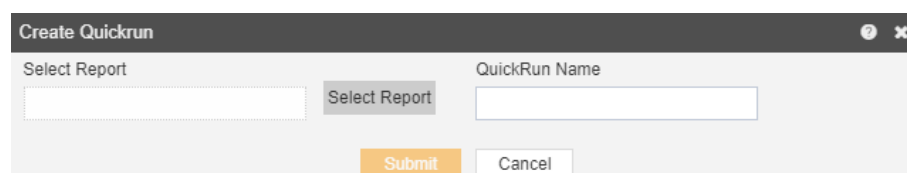
- If you want to run report with different parameter and you want some easier way to manage then Quickrun comes into action.
- Main purpose of using QuickRun is that you don't have write parameter of the report again and again you just save it to use in future.
- QuickRuns has following items:

1. Create Quickrun
2. Audit
3. Execute Quickrun
4. Edit Quickrun
5. Delete

Create Quickrun:-

- There are two ways in which a user can create quick run in the AIV application:-

1. By clicking on the create icon ![Create] located at the bottom most toolbar.
2. By right clicking any existing quick run as follows:-
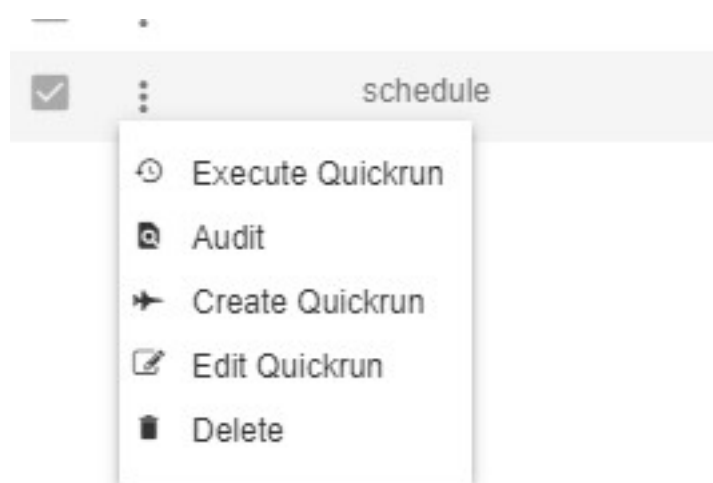
- By selecting create quick run using any of the above mentioned methods opens the following dialog box:-
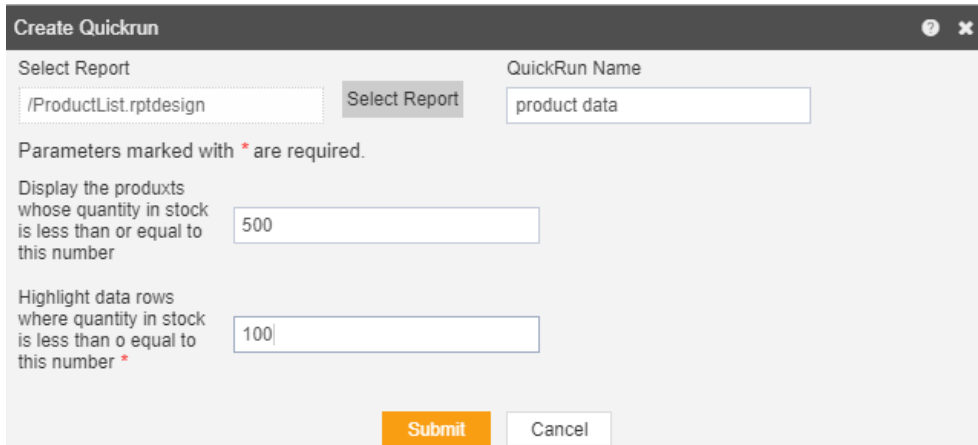
- Select the Report by pressing will open the following dialog box:-
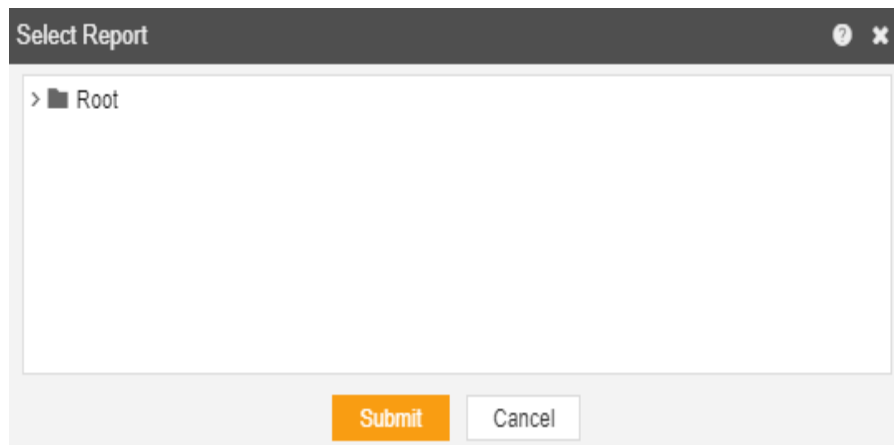
- Expand Root and select ProductList.rptdesign and hit submit button.
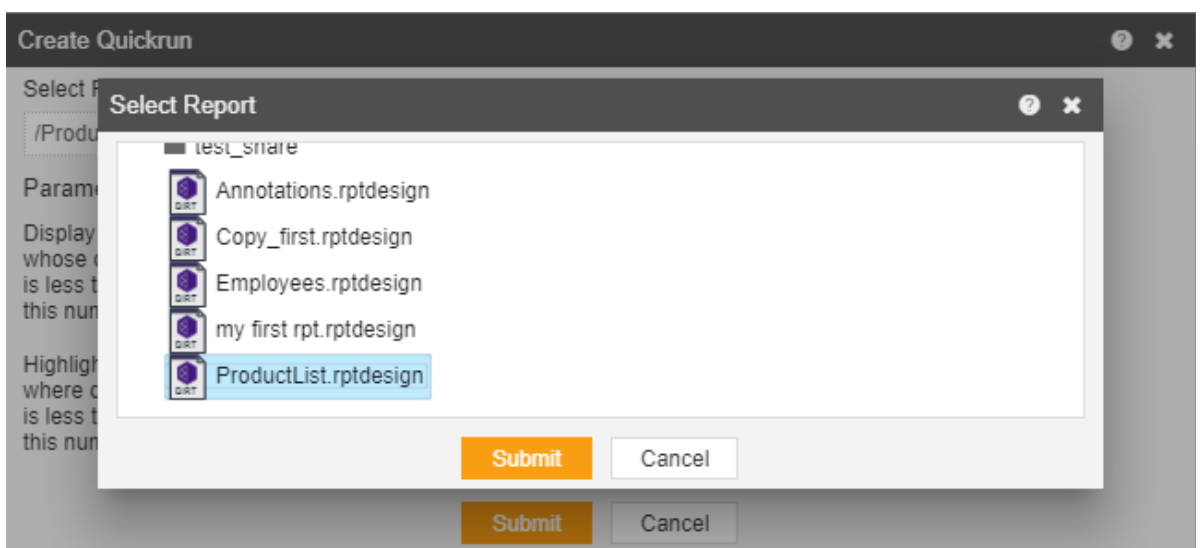
- You can also provide a name to your quick run as follows:-

- Enter the parameters as shown in the figure above and hit the submit button.
- You have now successfully created a quick run named product data.

Audit

- Audit shows the actions like when the user created, uploaded or downloaded any particular file.
- Following image describes the audit option.
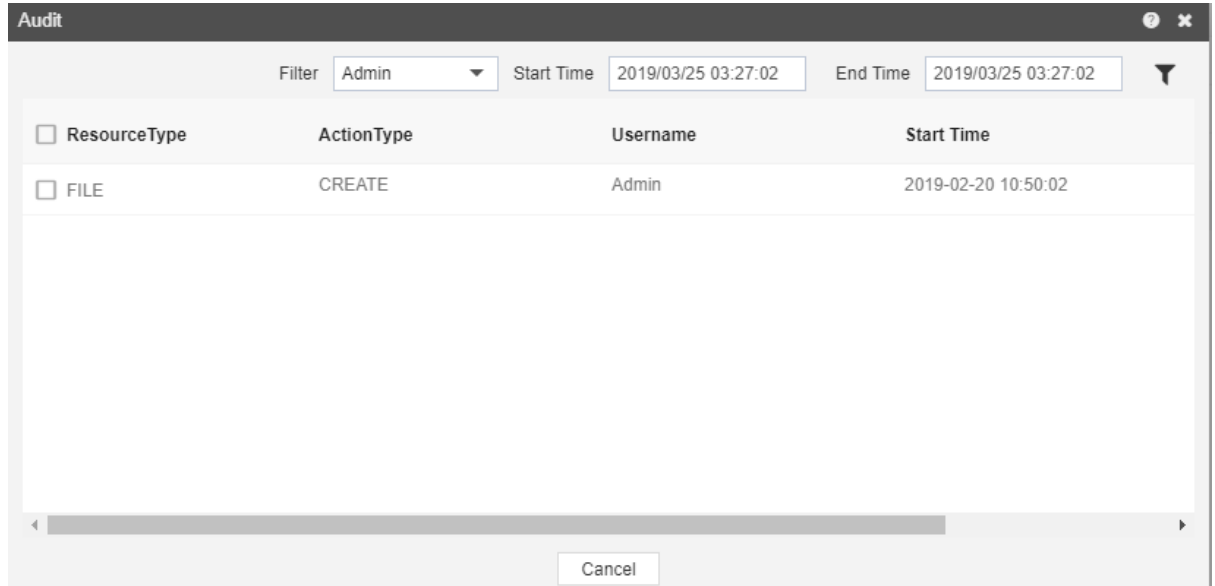
Execute Quickrun

- The execute quickrun option helps the user to execute a quickrun.
- This shows a list of quickrun associated with same parameterized report.
- For instance, when we perform execute quickrun on product data it gives a list of all the quickrun associated with **ProductList.rptdesign.**
- In order to execute quickrun, right click product data and select execute quickrun as follows:-
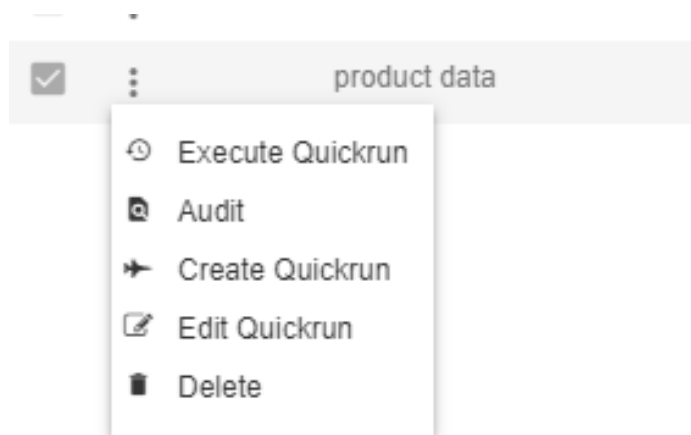
- This will open the following dialog box displaying list of quickrun using ProductList.rptdesign.
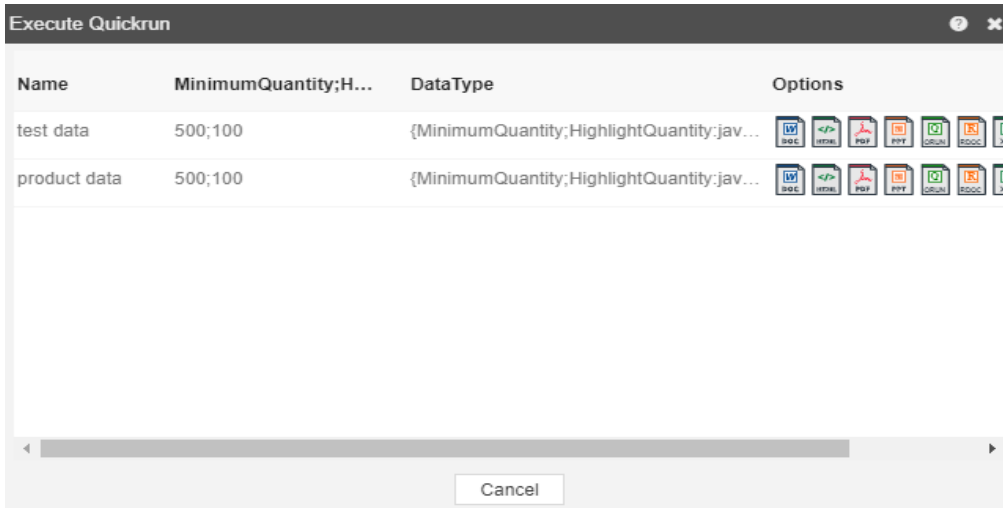
Edit Quickrun

- **Edit QuickRun** allows you to update **QuickRun** which includes updating the parameters of report**.** (Only users with **QuickRun** privilege have access to this section)
- To edit Quickrun follow below steps:
  1. Select Quickrun product data and right click and select

     ✎ Edit Quickrun
  2. The following dialog box will appear:-

3. Update value as shown above and click on **Submit** button to update Quickrun.

Delete

- There are two ways in which a user can delete a quick run in the AIV application:-

1. By clicking on the delete icon **🗑 Delete** located at the bottom most toolbar.
2. By right clicking the quickrun you want to delete. We will use product data in this tutorial for the purpose of understanding.
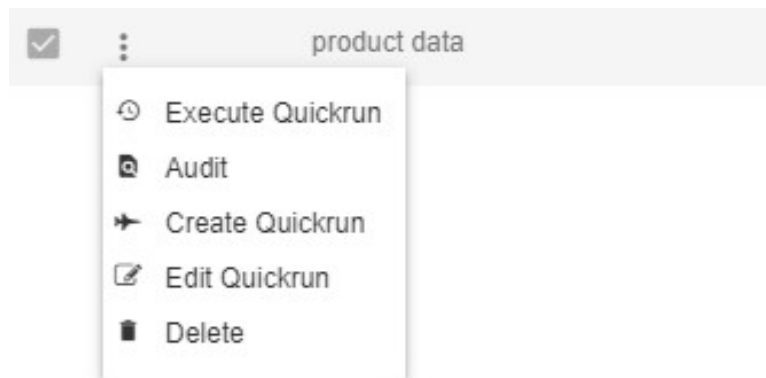
- Finally press on delete after selecting the report using any one of the above mentioned methods which will open the dialog box as shown below:-
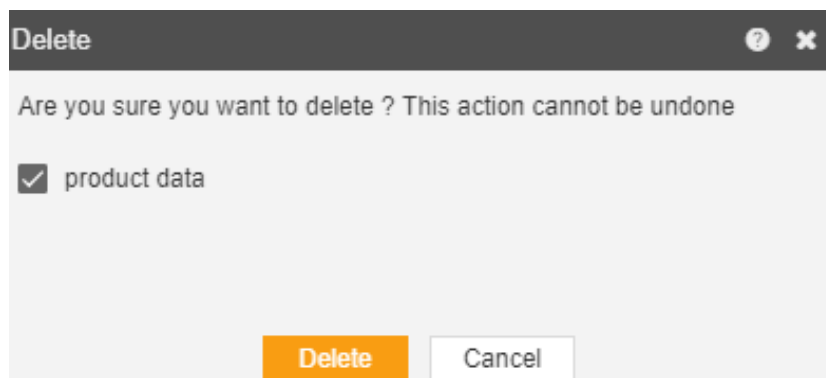
- Click on the **Delete** button to delete the quickrun.
- The quickrun will be deleted and a message will be displayed report deleted successfully.

Mappings

Dynamic Messages

- The user can use a dynamic message to give feedback or rate or survey any report.
- Message Types are Message, Survey, Rating, Subscription, and Feedback.

- Messages contains following items:

  - Create Message
  - Audit
  - Edit
  - Delete
  - Comment
  - Preview
  - Generate Report

Create Dynamic Message

- Create Message allows you to create a new Message.
- There are multiple ways you can create Message.

- Click ▣ Create button from the footer menu bar.
- The following dialogue box will appear:
-
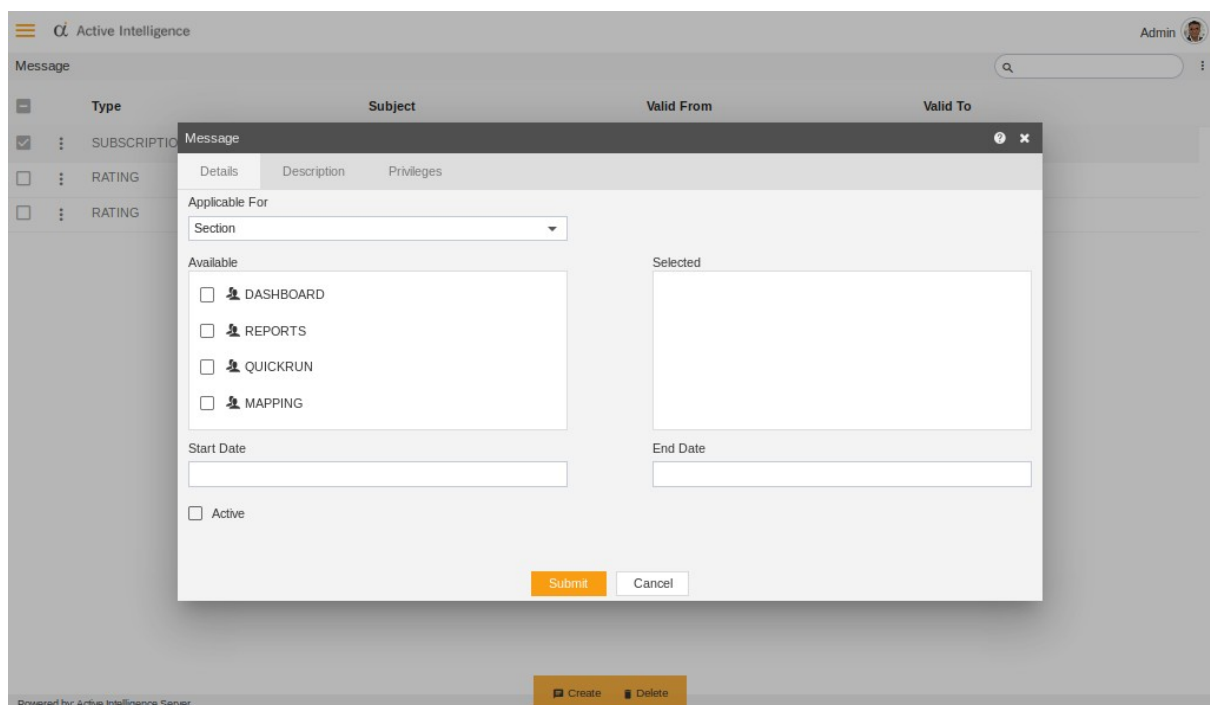
- The user can create Messages that are applicable to a particular File or Section.

- Choose the option to make Messages that are applicable to a particular File or Section.

- Fill all the desired information in Description Tab and Privilege Tab.

- Click on Submit button to create a message.

Audit

- Audit shows the actions like when the user created, uploaded or downloaded any particular file.
- Following image describes the audit option.
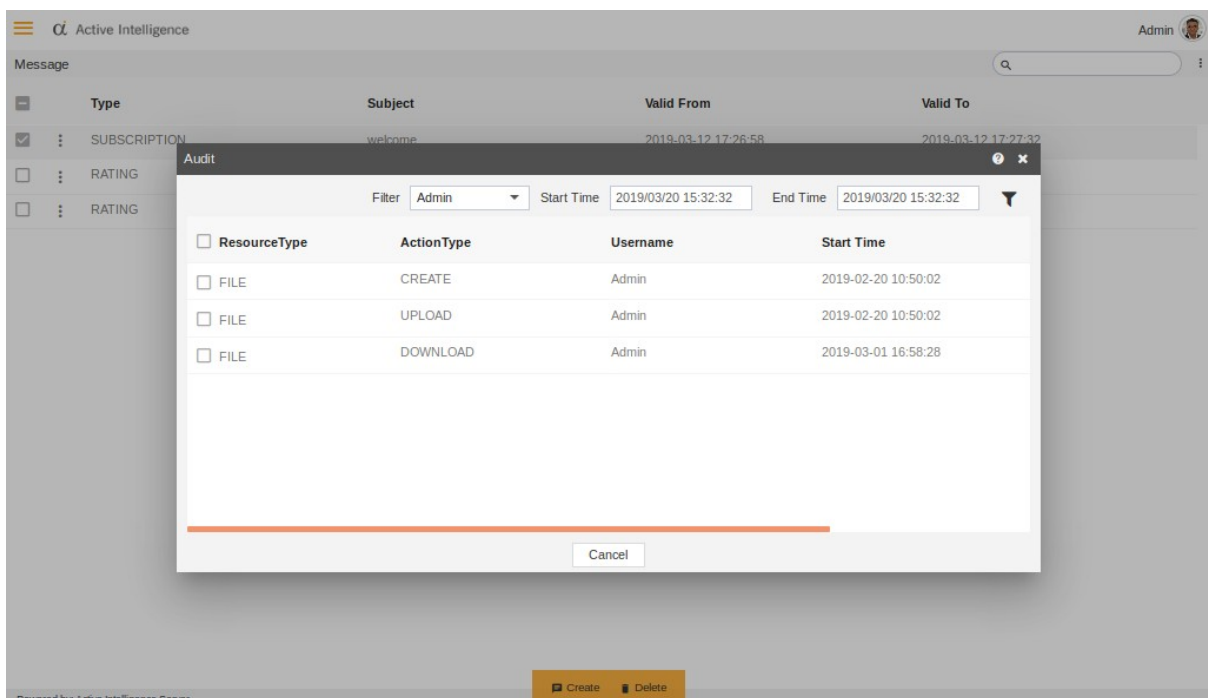
Edit Message

- Edit Message allows you to do the changes in Created Message.
- To edit message follow below steps:

- Select a message and right click and select ✎ Edit
- The following dialog box will appear.
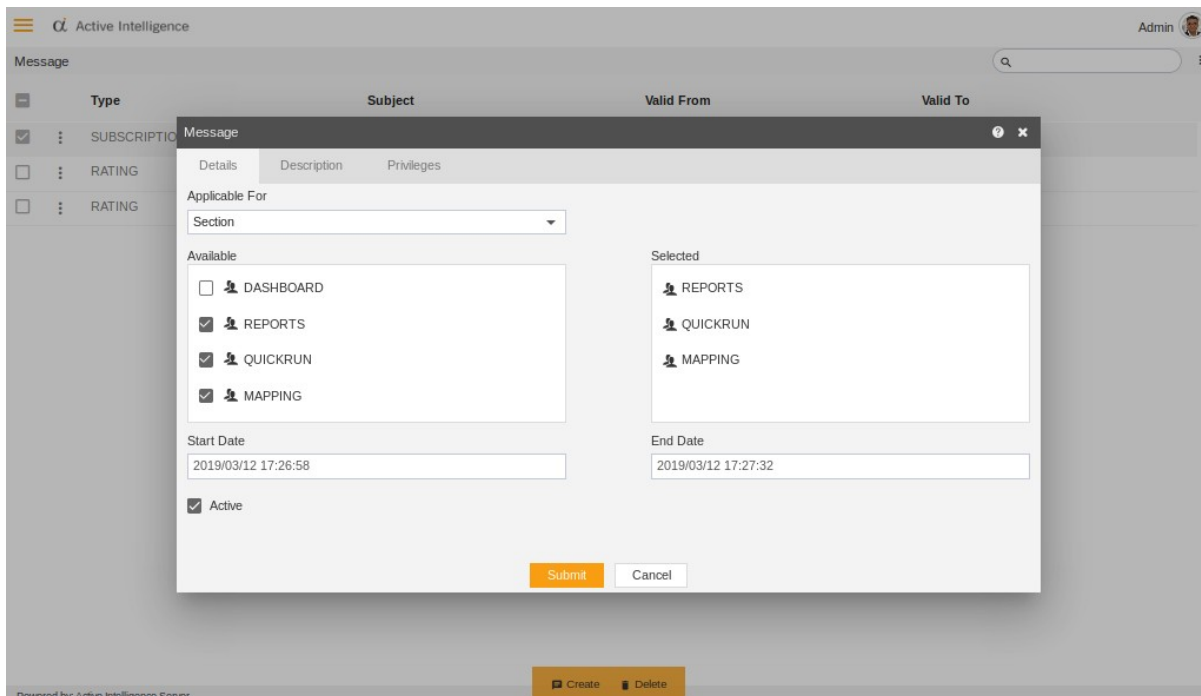
- Update the desired values in Details and Description Tabs and set Privileges accordingly
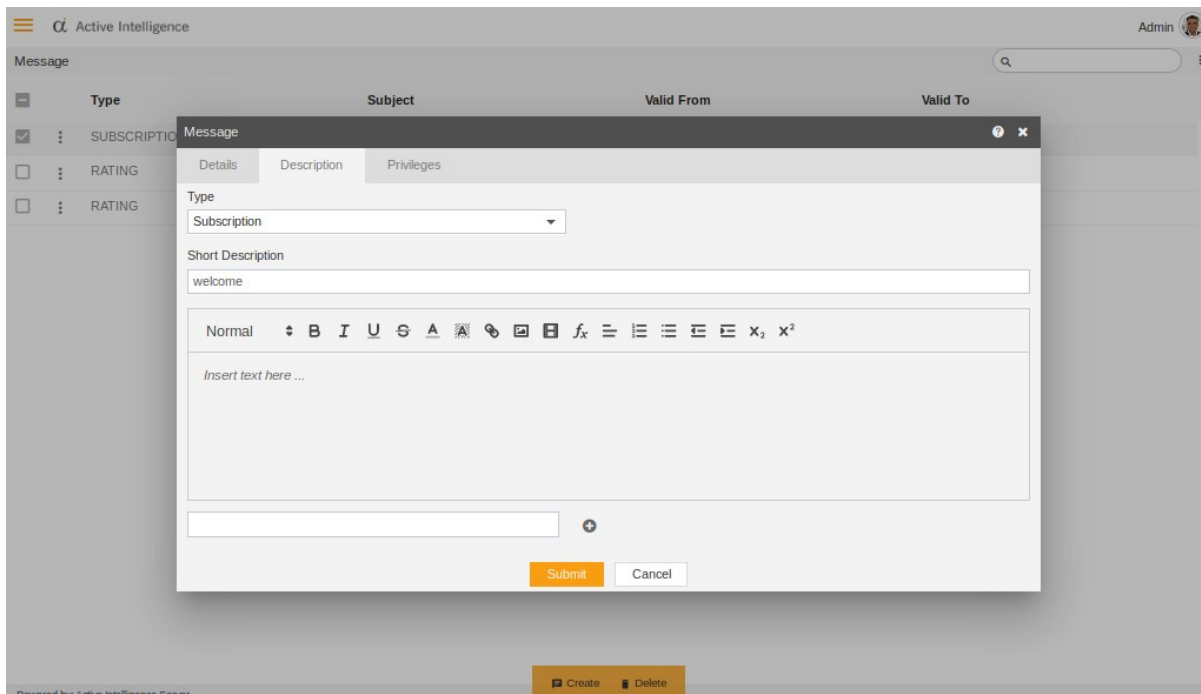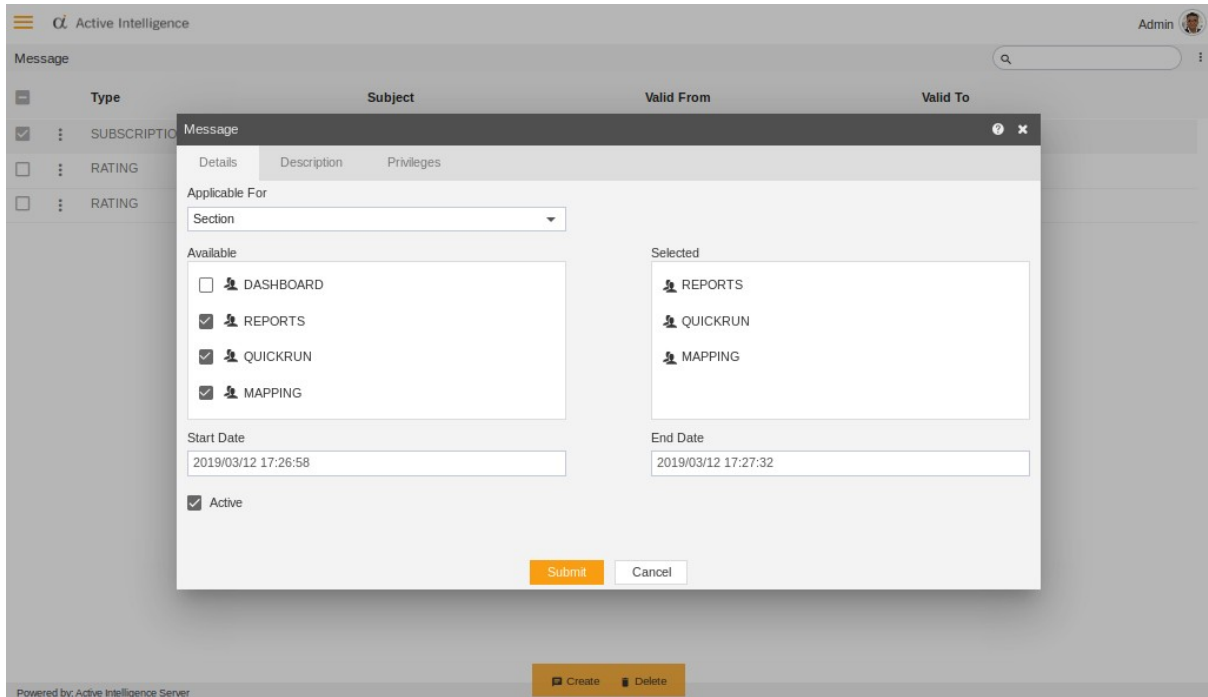
- Click on [Submit] button and message updated.

Delete

- The delete option is used to delete the selected message.
- To Delete a Message, follow these steps:
- There are multiple ways you can Delete Message (select the desired Message and right click and select [Delete] from the context menu or select [Delete] from the footer menu bar
- Note: Multiple Message Delete is permitted.
- Select the Message you wish to delete and Click [Delete] button from the footer menu bar.
- The following dialog box will appear:
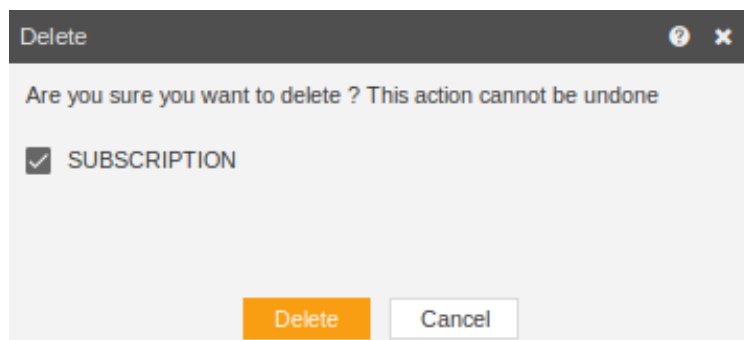
- Finally click ⬜Delete button to permanently delete a Dynamic Message, alternatively you can press Cancel button to cancel the action.

Comment

- Comments allows users to send Messages to each other for a particular ▤ File or the whole ⬚ Section which are shared between them.

- Select the Message from the Message section and right click and select
  ▤ Comment

- The Comments box would appear at the bottom right of the screen as follows
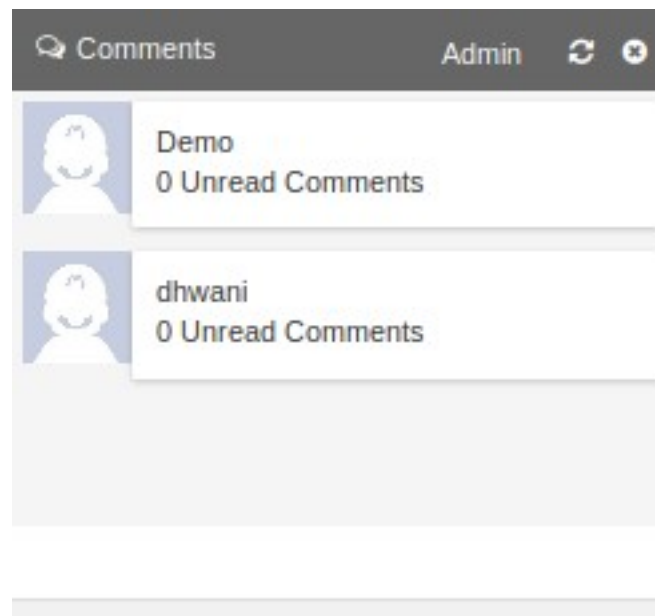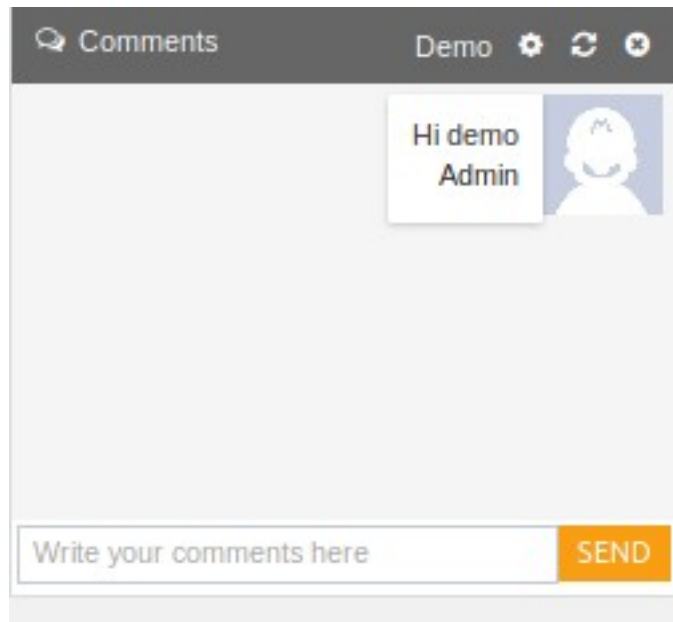
- User can reply to the message or he can send message to someone.

Preview

- Preview option is used to view the Messages in preview mode.

- Select the Message from the Message section and right click and select
  ◉ Preview in the options of the Message, the Preview of the Message would appear
  at the top right of the screen as follows:

Message Type: RATING

Message Type: SUBSCRIPTION

- These are the Preview of different Message Types which would be displayed for the selected ▮ File or ▥ Section.

Generate Report

- Generate report is used to generate the report of acknowledged message.

- Once the message is submitted, it has been acknowledged successfully and can be seen in generate reports.

- Following image shows the generate report.

Master Data

Datasource

The Datasource tab is the first sub-tab under the Master Data tab in AIV application. The main purpose of this tab is to create different databases and to connect to different database management systems. The Datasource section can be accessed by clicking on Datasource or by clicking on ⊡ next to the Datasource tab, which will open the Datasource in a new tab. The primary purpose of the Datasource section to perform different functionalities related to reports such as:

1. Create Datasource
2. Create Dataset
3. Delete
4. Edit Datasource
5. Search
6. Instant Messages
7. Admin Details

Create Datasource

- There are two ways in which a user can create a datasource in the AIV application:-
    1. By clicking on the create icon ▤ Create located at the bottom most toolbar.
    2. By right clicking on any existing datasource as follows:-
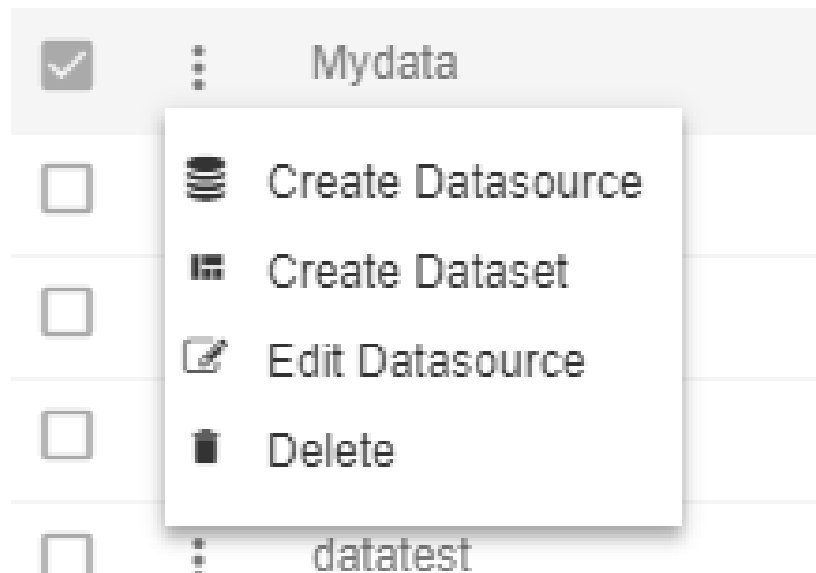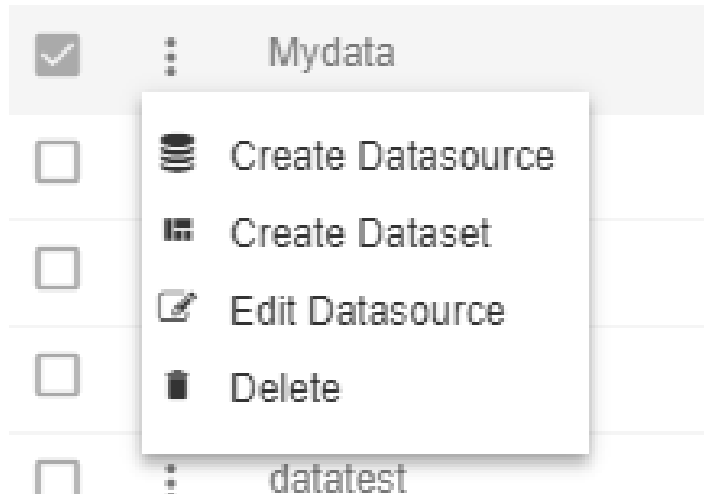
- Click on the Create Datasource using any of the methods above which will open the dialog box as shown below:-

- Here we are creating a datasource named Customer Data which will store data related to the customers and hence the display name.
- Put wait time as 1.
- Is JNDI is kept False.
- As we are connecting JDBC with MySql "com.mysql.jdbc.Driver" driver is used to connect.
- Provide your connection URI as shown in the figure.
- The Username is root and password is password to connect to the server.
- After that test connection, if it is successful click on save else click cancel.
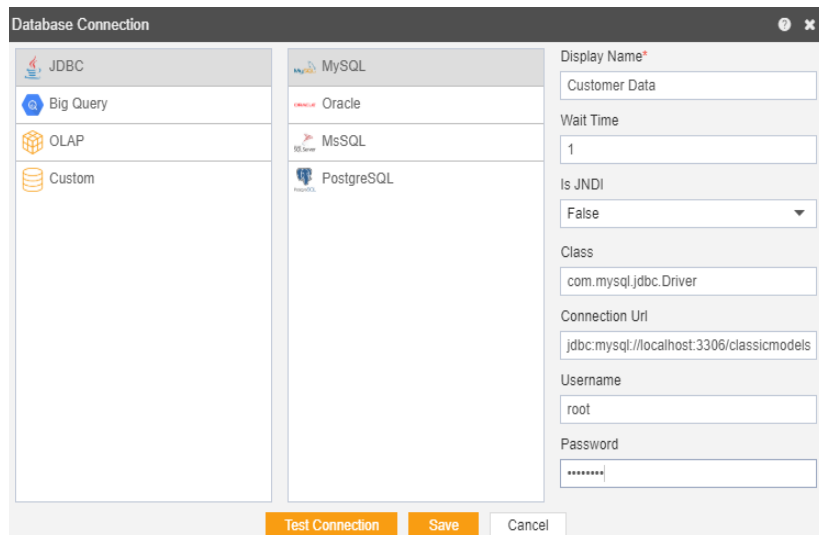
the you an well.

While saving database, will be given option to create a dataset as
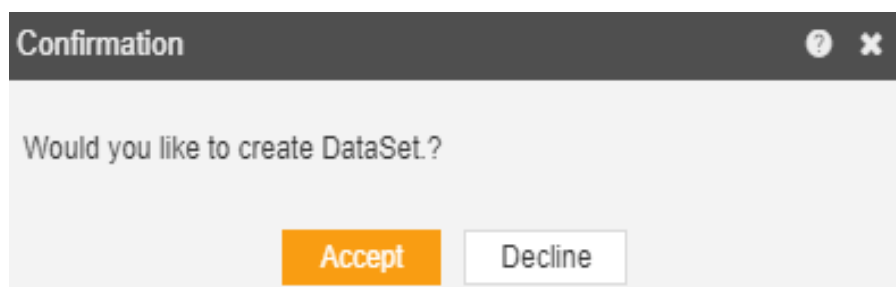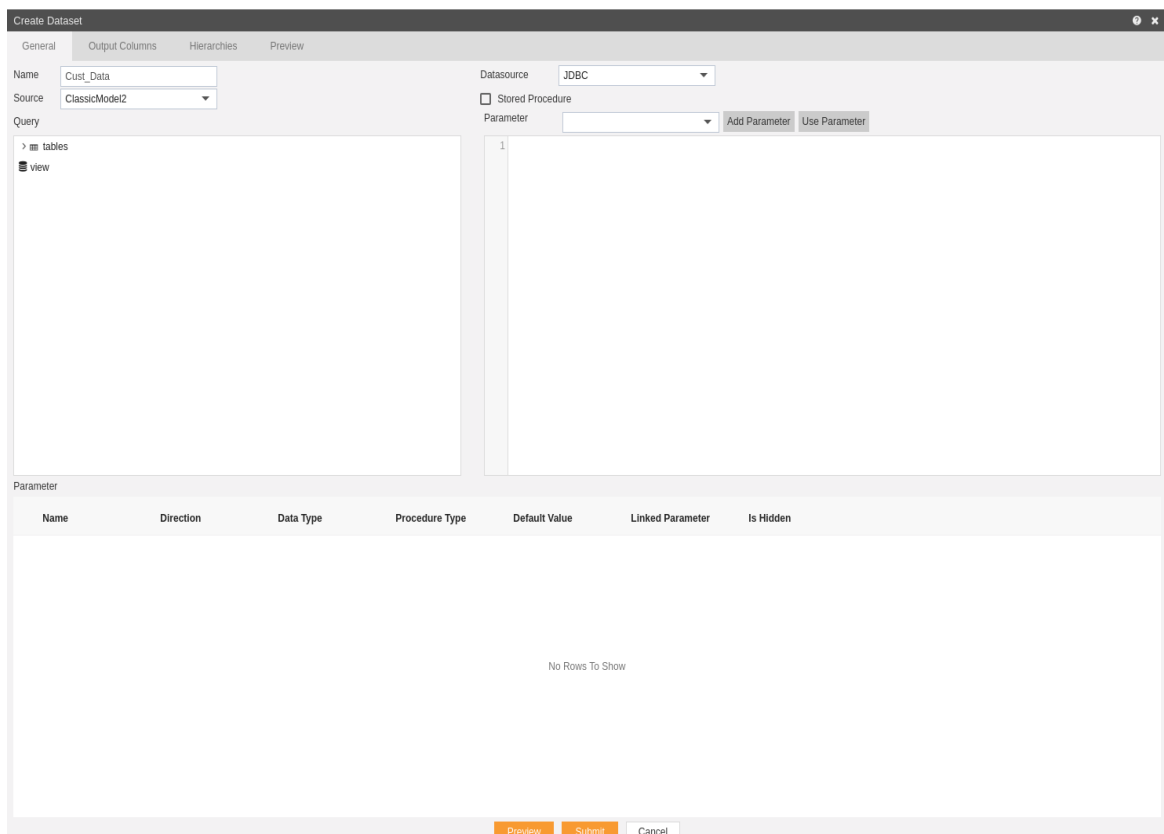
- Accept if you want to create a DataSet right now or decline for later.
- You have successfully created a datasource in the AIV application.

Create Dataset

- There are three methods to create a dataset:-
  1. Accept to create dataset while creating a Datasource.
  2. Click on the create dataset button [⊞ Create Dataset] at the bottommost toolbar to create a dataset.
  3. Right click the datasource and select create Create Dataset to create new dataset.

- After clicking the create dataset following pop-up will be opened:-

- In the name section give dataset name as "Cust_Data".
- Select ClassicModel2 as the Datasource.

- In the Query section expand tables to see the tables that exist in the current Datasource.

-

Create Dataset

General	Output Columns	Hierarchies	Preview

Name   Cust_Data

Source   ClassicModel2

Query

- ˅ ▦ tables
  - › policeresource
  - › countrysales
  - › crime2015
  - › products
  - ˅ customers
    - ▪ customerNumber
    - ▪ customerName
    - ▪ contactLastName
    - ▪ contactFirstName
    - ▪ phone
    - ▪ addressLine1
    - ▪ addressLine2
    - ▪ city
    - ▪ state
    - ▪ postalCode

- Expand the customers table.
  - Drag and drop customers on the empty screen to write query.

  - The following pop-up box will be opened.

Select Columns   ❓ ✕

	Name	Alias
☐	customerNumber	customerNumber
☐	customerName	customerName
☐	contactLastName	contactLastName
☐	contactFirstName	contactFirstName
☐	phone	phone
☐	addressLine1	addressLine1
☐	addressLine2	addressLine2

Submit   Cancel

  - Select the columns customerNumber, customerName, phone, addressLine1, addressLine2, city,state, country from the List Box and press Submit.

- The following sql query will be displayed:-

- Keep the Datasource as JDBC.
- Press **Preview** to preview the results and **Submit** in order to submit the query and create the dataset
- In order to view Output Columns, click on the Output Column tab that displays

Datasource	JDBC ▾
☐ Stored Procedure	
Parameter	▾ Add Parameter Use Parameter

```
1  select customerNumber AS "customerNumber",customerName AS "customerName",addressLine1 AS "addressLine1",addressLine2 AS
   "addressLine2",city AS "city",state AS "state",country AS "country" From customers
```

Columns as follows:-

Create Dataset

General	Output Columns	Hierarchies	Preview

-

Name	Type	Alias	Format	Data Type

Edit Dataset

General	Output Columns	Hierarchies	Preview

CustomerNumber	CustomerName	AddressLine1	AddressLine2	City	State	Country
103	Atelier graphique	54, rue Royale		Nantes		France
112	Signal Gift Stores	8489 Strong St.		Las Vegas	NV	USA
114	Australian Collectors, Co.	636 St Kilda Road	Level 3	Melbourne	Victoria	Australia
119	La Rochelle Gifts	67, rue des Cinquante Otages		Nantes		France
121	Baane Mini Imports	Erling Skakkes gate 78		Stavern		Norway
124	Mini Gifts Distributors Ltd.	5677 Strong St.		San Rafael	CA	USA
125	Havel & Zbyszek Co	ul. Filtrowa 68		Warszawa		Poland
128	Blauer See Auto, Co.	Lyonerstr. 34		Frankfurt		Germany
129	Mini Wheels Co.	5557 North Pendale Street		San Francisco	CA	USA
131	Land of Toys Inc.	897 Long Airport Avenue		NYC	NY	USA
141	Euro+ Shopping Channel	C/ Moralzarzal, 86		Madrid		Spain
144	Volvo Model Replicas, Co	Berguvsvägen 8		Luleå		Sweden
145	Danish Wholesale Imports	Vinbæltet 34		Kobenhavn		Denmark
146	Saveley & Henriot, Co.	2, rue du Commerce		Lyon		France
148	Dragon Souveniers, Ltd.	Bronz Sok., Bronz Apt. 3/6 Tesvikiye		Singapore		Singapore

After this, preview to check if you have performed steps correctly.

- In order to view the dataset, go to the Dataset section , and you will notice Cust_Data has been created over there with the date that you have last updated it.
- In this manner, you can create a new dataset for your datasource.

Delete

- There are two methods to delete a datasource:-

1. Click on the delete button at the bottommost toolbar to delete the dataset.
2. Right click the datasource and select Delete to delete the dataset.
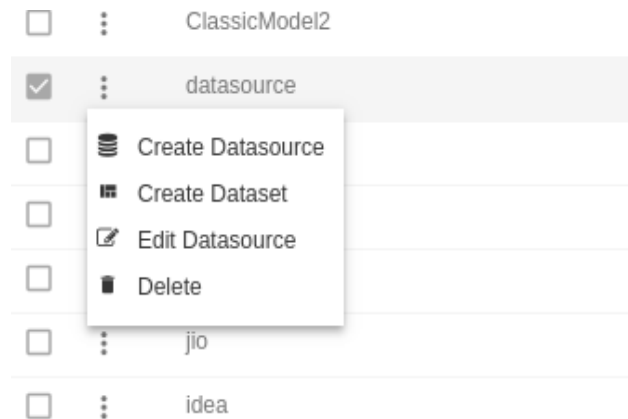
- In this case, we have deleted a Datasource named "datasource".
- After you press, following popup will be opened:-
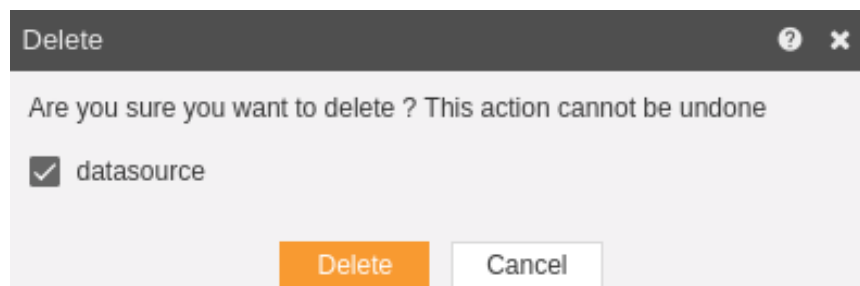
Press on

Delete button and Refresh the page from the top right elapses ⋮.

- You can see "datasource" has been deleted from the Datasource page.

Edit Datasource

- In order to edit the datasource, right click on the desired datasource.
- We are working with Customer Data for our example.
- Let us edit the Datasource and rename it as Customer_Data.
- Right click Customer Data and select Edit datasource as follows:-
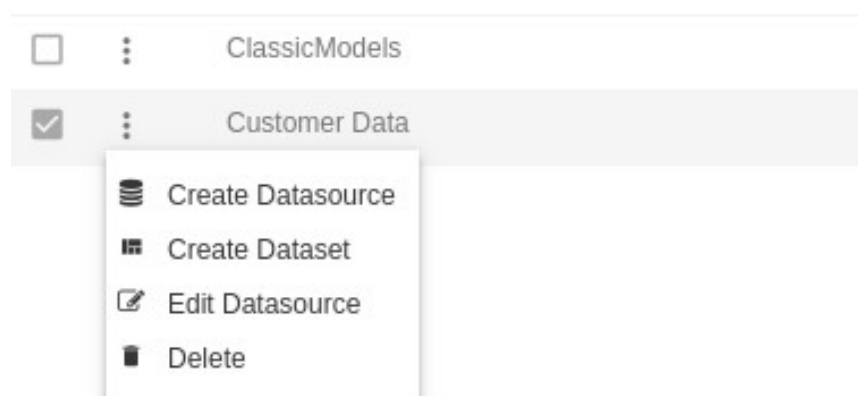
- This will open a popup. Rename Datasource as Customer_Data as follows:-
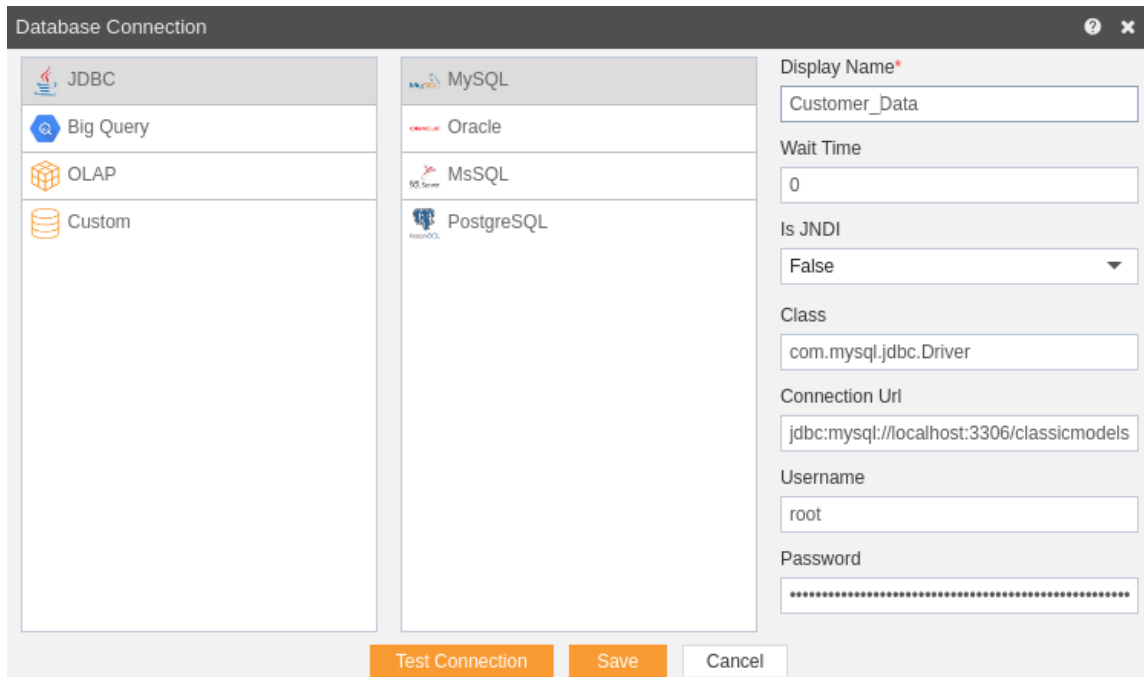
- You can change your driver as well as data source using edit data source.
- In our case, we will leave everything else as it is and rename display name as Customer_Data.
- Test Connection, and if it is successful save changes by clicking Save button.
- As you can see, datasource name has been updated to Customer_Data.
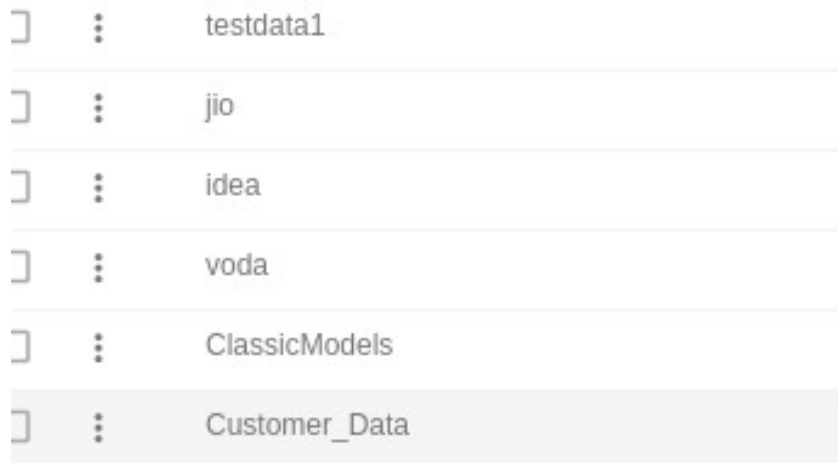
Datasource Mapping

Active Intelligence Visualization Tutorials
Topic:- How to perform the Datasource mapping for different users and user roles

Datasource mapping plays an important role in a scenario where there are multiple users connected to different data sources and working on the same AIV v4 application.

- For instance, there is a common dashboard named telecom which is being shared by different service providers such as Reliance-Jio, Idea, Vodafone to name a few.

- They want to display a table depicting the list of their current users on the dashboard.

- In such case, depending on the telecommunications giant a particular user is registered with, different data must be shown to the users, i.e. if a user is registered with Reliance-Jio, then he should see only the data of Jio customers and not that of Idea or Vodafone users.

- Without Datasource mapping, one has to create multiple dashboards in order to achieve this which increases the complexity and also the time to maintain different dashboards.

- Hence, in order to ease the process, this can be implemented on the AIV v4 application using Datasource mapping by following some simple steps as below:-

1) Go to the Users tab in the administration section of the AIV v4 application and create 3 new users by clicking on create user as follows.
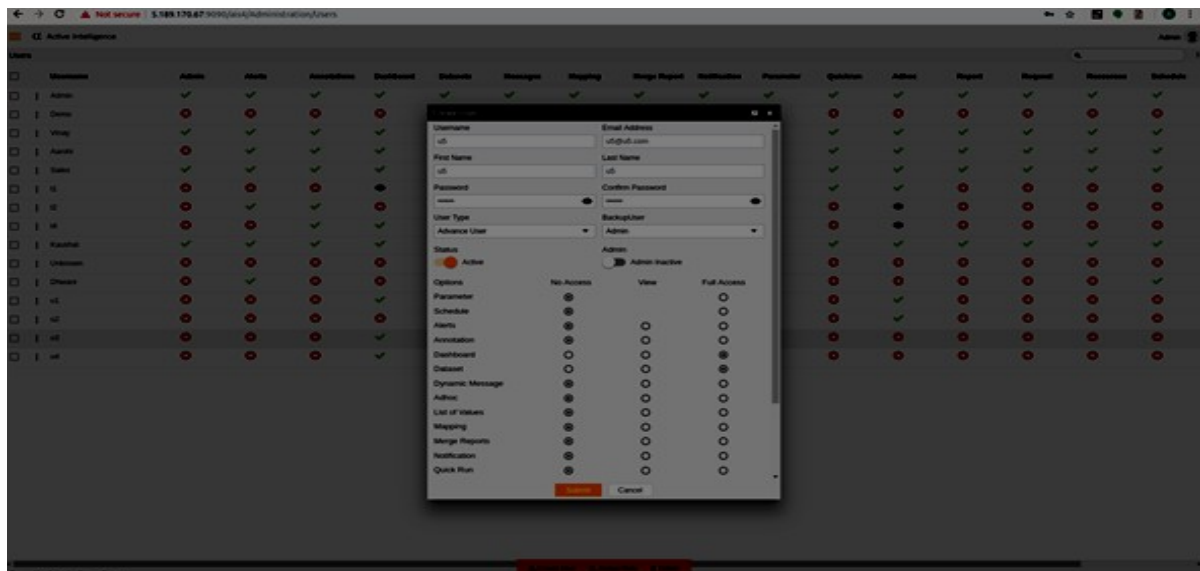
2) Assign different roles to the users by right clicking on the user and selecting edit user role or by selecting a user and clicking on Assign role button at the footer of the page.

- Assign user1 to idea.
- Assign user2 to jio.
- Assign user3 to voda.

An example has been shown for your reference in which user1 is assigned to role idea Datasource.

In a similar manner, user2 is assigned to jio and user3 is assigned to voda data source.
3) Next, go to the Master Data section and select on Datasource mapping, a popup shown as below will be opened by clicking it.
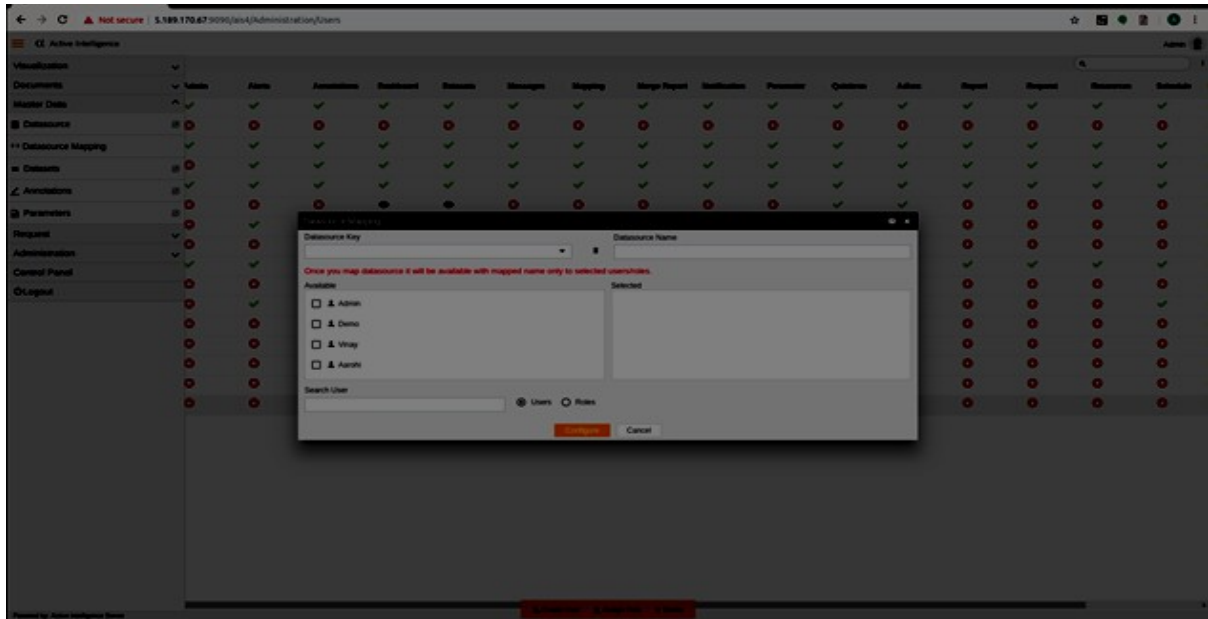
4) In order to perform the mapping, for user1 select idea as the Datasource key and give a name to the Datasource, submit by clicking on configure which will perform the mapping as follows.*
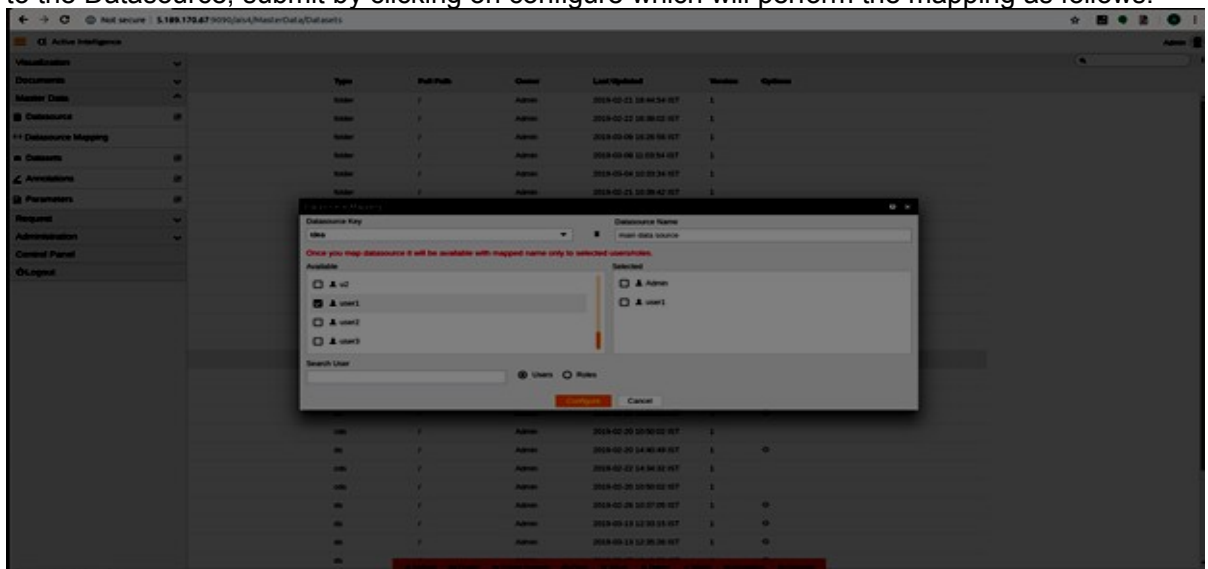
* Note:- It is important to note that the Datasource will be visible with the name mentioned in the Datasource name only to the users whose name is selected from the list. Hence, In order to view the Datasource in your account, you need to select your user name which was registered with AIV v4. Currently, main_data_source will be visible only to Admin and user1.

5) In order to view the Datasource, go to the Master Data -> Datasets. For this particular example, my customers dataset is created and double-click on it in order to open it. You can create your own dataset by clicking on create a dataset. This will open the following pop-up. As the current user is Admin, you can see main_data_source is available in the drop-down list.
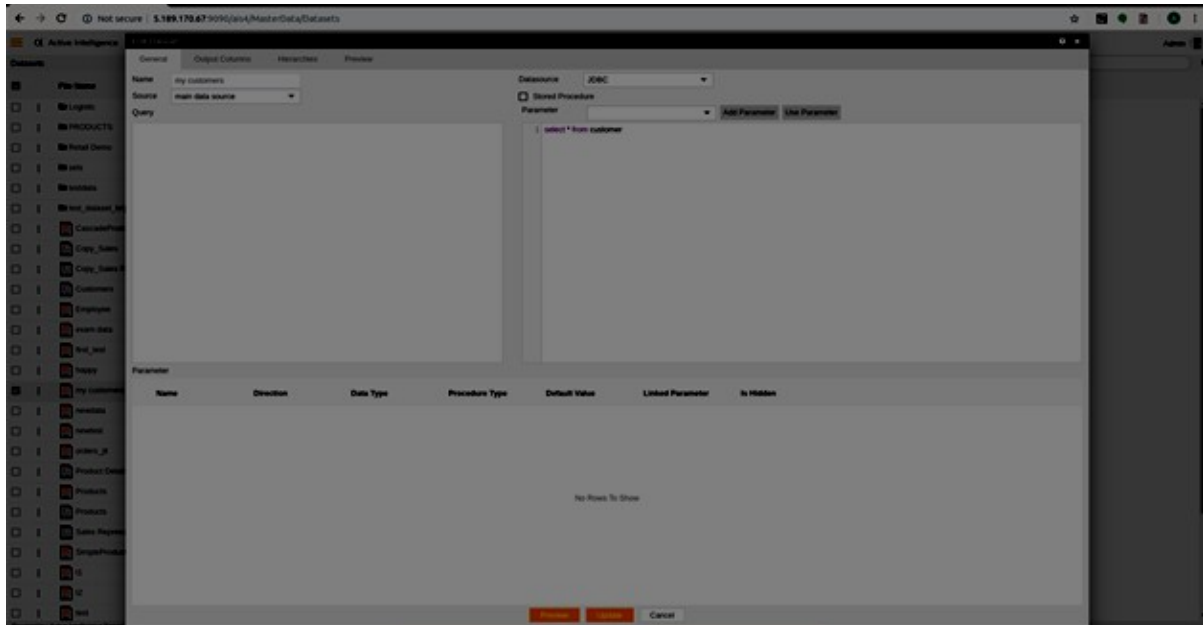
6) In order to preview the results, click on the preview tab which will show the list of all the idea users as current user Admin is assigned to an idea as seen in the previous steps.

7) Now, in order to view the list of customers on the dashboard telecom login with the particular user details and go to the dashboard telecom. Let us login with user1 credentials in order to understand how this can be performed.

- Login with user1 username and password.
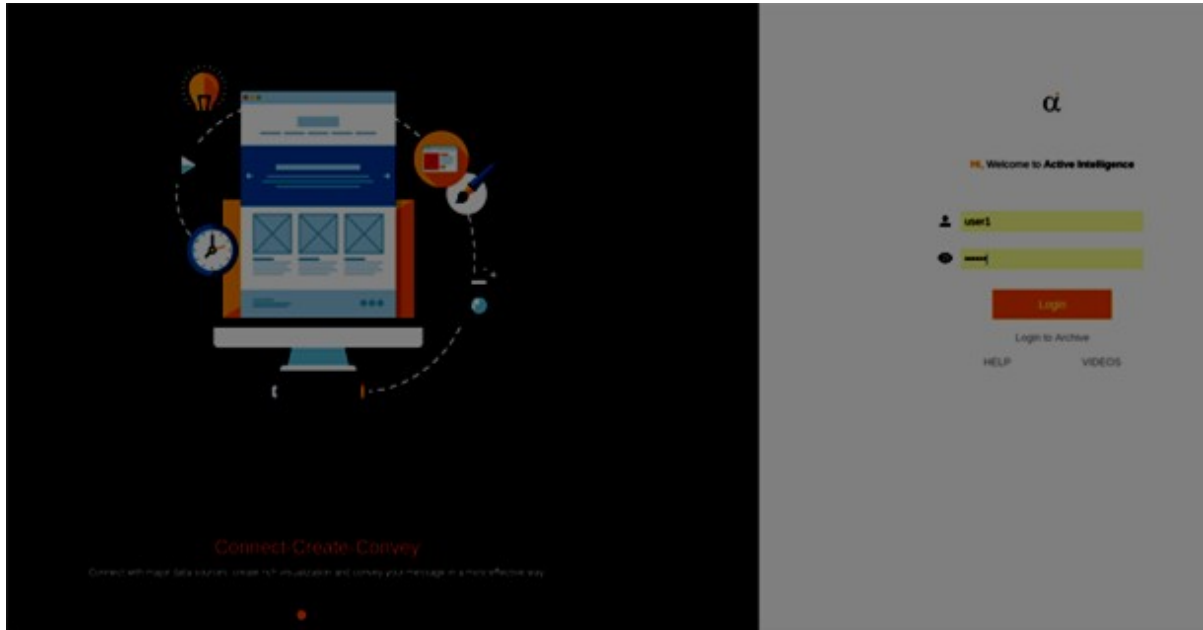
- Go to the dashboard and double-click on telecom dashboard, if it is not visible then you can enter telecom in search and press enter.
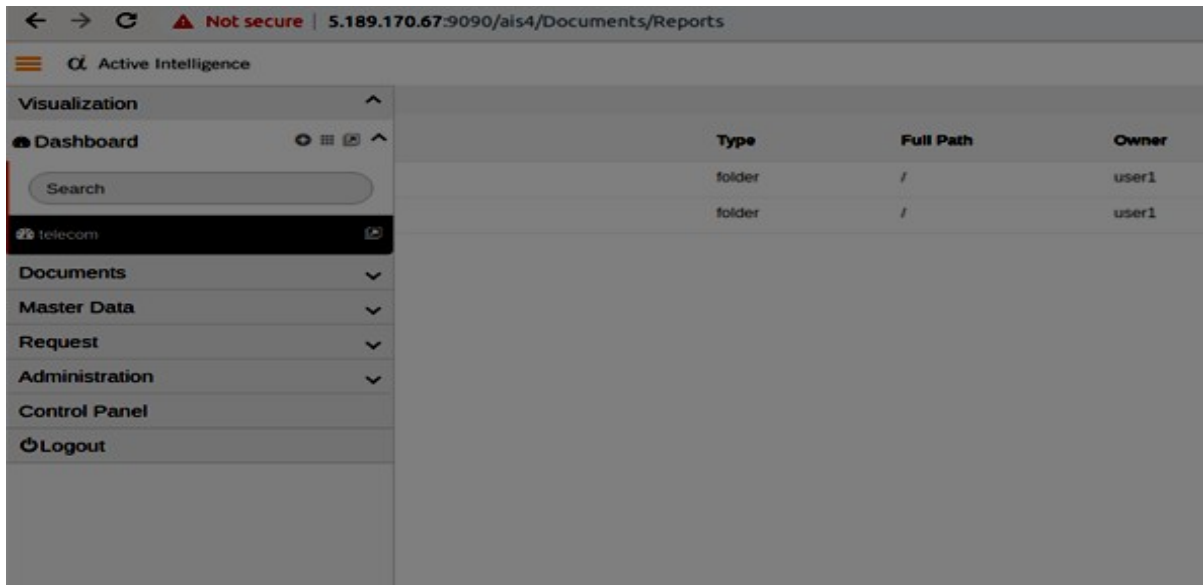
- Double-click telecom and the following screen will be displayed which illustrates the list of all the idea customers as user1 was mapped to idea service provider.

- Similarly, you can log in with user2 to see a list of jio customers and user3 to see a list of Vodafone customers as follows:-
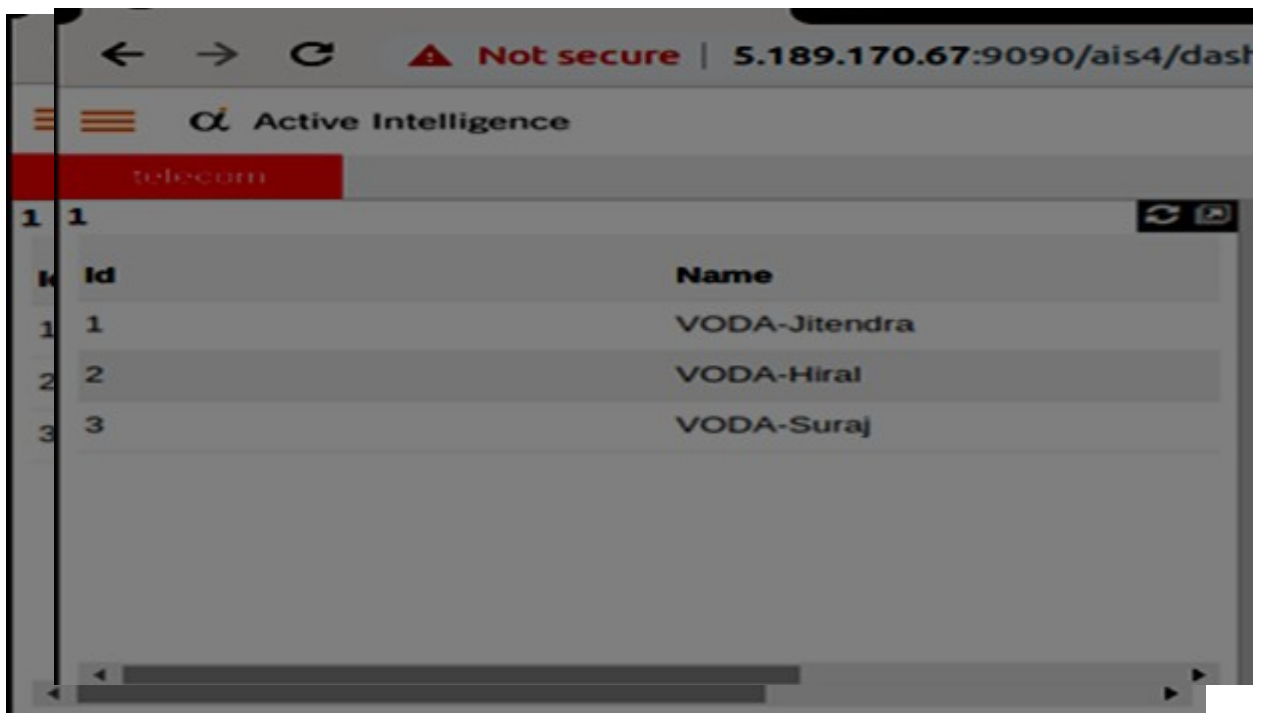
In this way, Datasource mapping can be used when different data is to be displayed to different users on the same dashboard.

Datasets

A **Dataset** is a collection of data of one or more columns from a single table or multiple tables organized for processing by business intelligence software to extract meaningful information and generate reports, charts, maps and create different visualization.

The source of the data can vary depending on how the organization are managing their data, It can be a JDBC, Flat file, Web service, etc. regardless of how the data is stored, once the connection bridge is built between the Database and AIV (Active Intelligence Visualization) user can create different datasets relevant to different departments and users within the organization.

Note: Only user with the Dataset privilege can access this section, contact your server Administrator if this option is not available to you

Using the Datasets section user can perform the following tasks:-
1. Upload
2. Create Folder
3. Create Dataset
4. Edit Dataset
5. Open Folder
6. Copy
7. Move
8. Delete
9. Share
10. Create Dataset Mapping
11. Run Dataset Mapping
12. Schedule Dataset
13. Unarchive
14. Unpurge
15. Audit
16. Version
17. Download
18. Property
19. Instant Messages
20. Search

Upload

- The user can upload dataset of the format .ds or .cds by clicking on the upload icon on the toolbar located at the bottom of the Datasets page.
- On clicking the icon, following screen will be displayed.

- In the Files section as shown in the figure above, select the upload icon in order to upload your datasets from your computer.
- If the dataset already exists on the AIV application, the user has an option to replace the default dataset or to create a new dataset using the version option as depicted above.
- Furthermore, the user can also provide an optional description for reference, in the description text area shown here.
- There is also an option to hide the visibility to certain users using the privileges tab as shown in the figure below:

- In case of working with any new version of the dataset, you can assign the default version share privileges by checking the checkbox. For instance, if there are three versions of same dataset and a new version is to be created of that dataset, then default share privileges can be applied to that dataset..
- The user can select other users who can share the dataset from the list of available users or search them in the search user bar.
- In a similar manner, the user can apply privileges to different user roles as follows:-

- Just as in case of users, the user can assign default share privileges to different user roles or can select the roles from the Available list of roles.
- The user can also search for roles in the Search Role bar.
- Visibility is used to mention who all can view the report and is of following three types:-
    1. **Private:-** It means only the current user can view the file.
    2. **Internal:-** It means all the users within the organization can view the file.
    3. **Public:-** It means anyone can view the file.

- The user can select the visibility from the dropdown menu as shown above.

- In case of any further help, the user can click on the [?] icon to access the AIV help documents.
- Finally, in order to upload the dataset, click on the upload button.
- If the user is not satisfied and wants to cancel the upload request, he can do this by

clicking on the cancel button next to upload or by clicking on [x] button next to the [?] icon.

Create Folder

- There are two ways in which a user can create a new folder in the AIV application.
    1. By clicking on the create icon 🗂 Create next to the upload icon at the bottommost toolbar.
    2. By right clicking on any existing file or folder on the dataset page as follows:
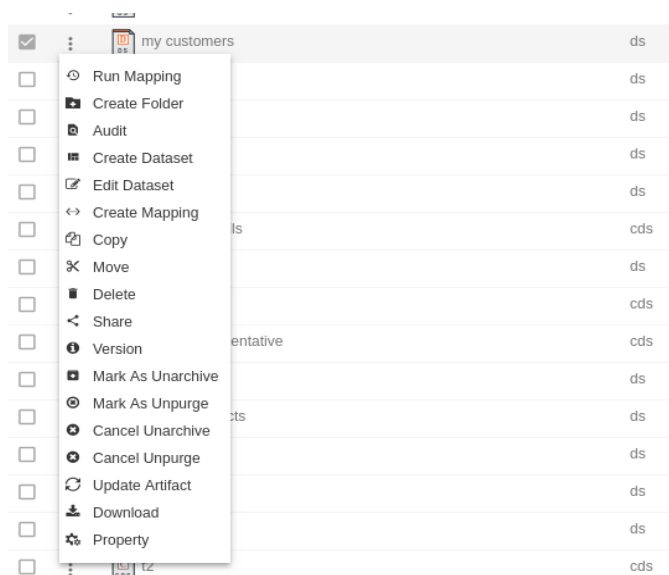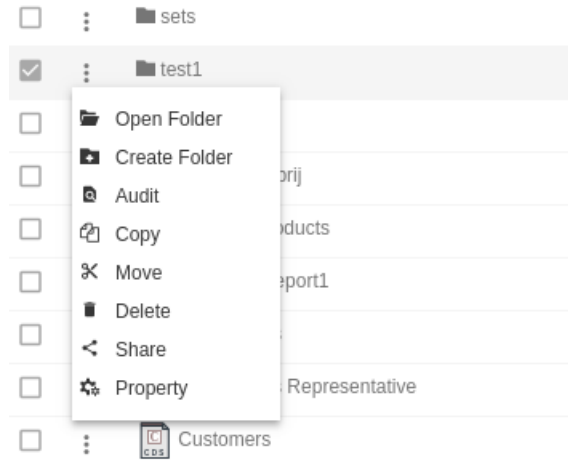
1. On clicking on create folder, following popup will be opened.
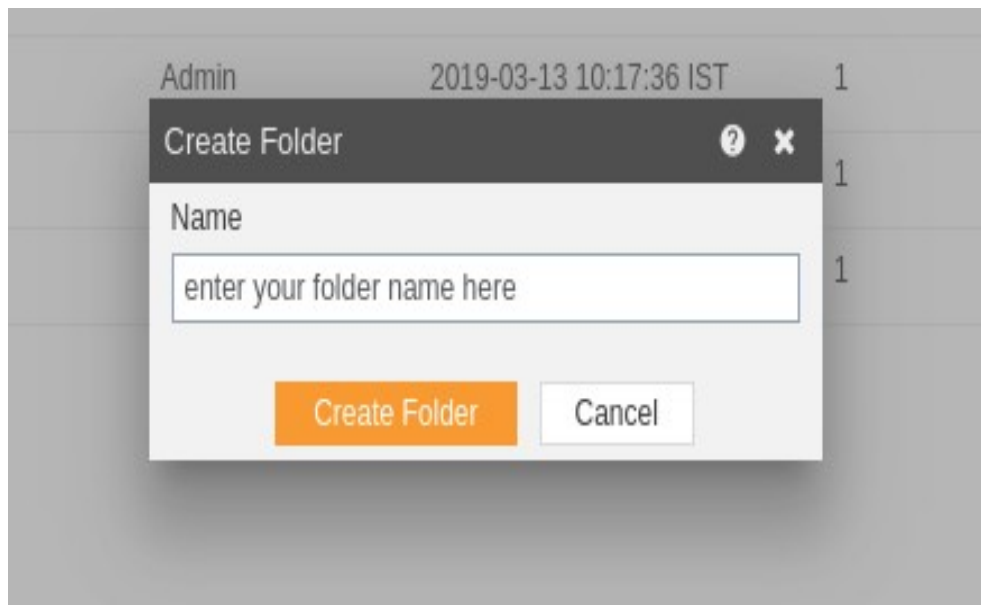
2. In case of any further help, the user can click on the icon to access the AIV help documents.
2. Enter the name you want to give to your folder in the text area and click on create folder.
2. If the user is not satisfied and wants to cancel the create request, he can do this by clicking on cancel button next to upload or by clicking on button next to the icon.

Open Folder

- There are two ways in which a user can open a folder in the AIV application:-
    1. On right clicking any of the existing folder, following menu will be displayed. To open folder PRODUCTS, click on Open Folder.
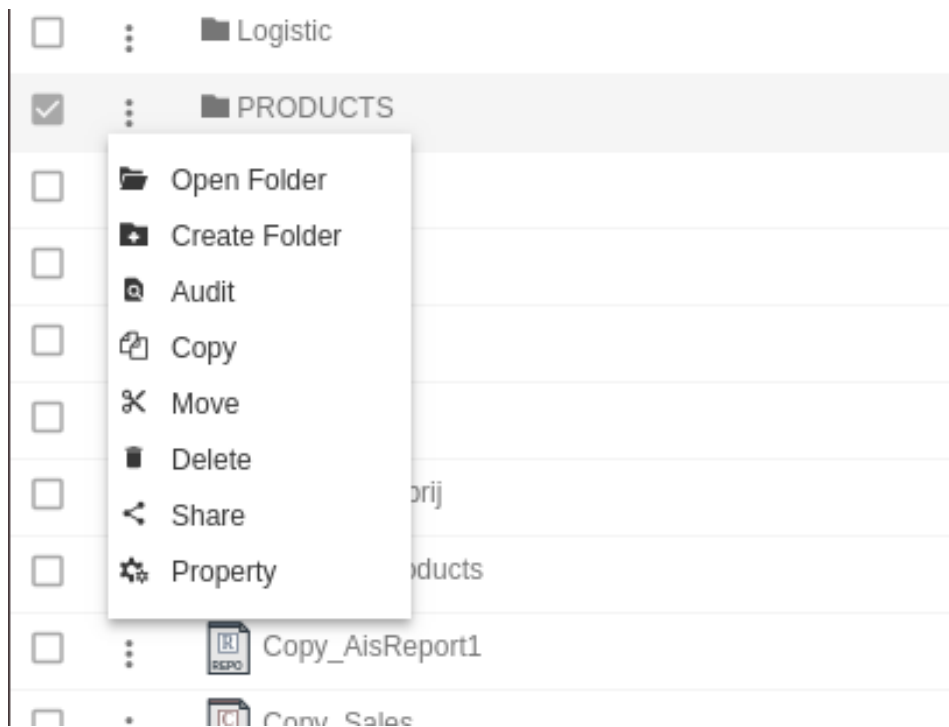
2. By double clicking the folder which you desire to open.

Create Dataset

- There are three methods to create a dataset:-
1. Accept to create dataset while creating a Datasource.
2. Click on the create dataset button [Create Dataset] at the bottommost toolbar to create a dataset.
3. Right-click the datasource and select create Create Dataset to create the new dataset.

- After clicking the create dataset following pop-up will be opened:-

- In the name section give dataset name as "Cust_Data".
- Select ClassicModel2 as the Datasource.

- In the Query section expand tables to see the tables that exist in the current Datasource as shown above.
- Expand the customers table.
- Drag and drop customers on the empty screen to write a query.
- The following pop-up box will be opened.

- Select the columns customerNumber, customerName, phone, addressLine1, addressLine2, city, state, country from the List Box and press Submit.
- The following SQL query will be displayed:-

- Keep the Datasource as JDBC.

- Press **Preview** to preview the results and **Submit** in order to submit the query and create the dataset
- In order to view Output Columns, click on the Output Column tab that displays Columns as follows:-

- After this, preview to check if you have performed steps correctly.

- In order to view the dataset, go to the Dataset section , and you will notice Cust_Data has been created over there with the date that you have last updated it.
- In this manner, you can create a new dataset for your datasource.

Edit Dataset

- The purpose of edit dataset is to enable the users to update the datasource or to provide a query with your own input parameters.
- To Edit Dataset, follow these steps:(Only users with Dataset privilege have access to this section)

1. To Edit Dataset select the desire Dataset and right click and select ✒ Edit Dataset from the context menu as shown below:-
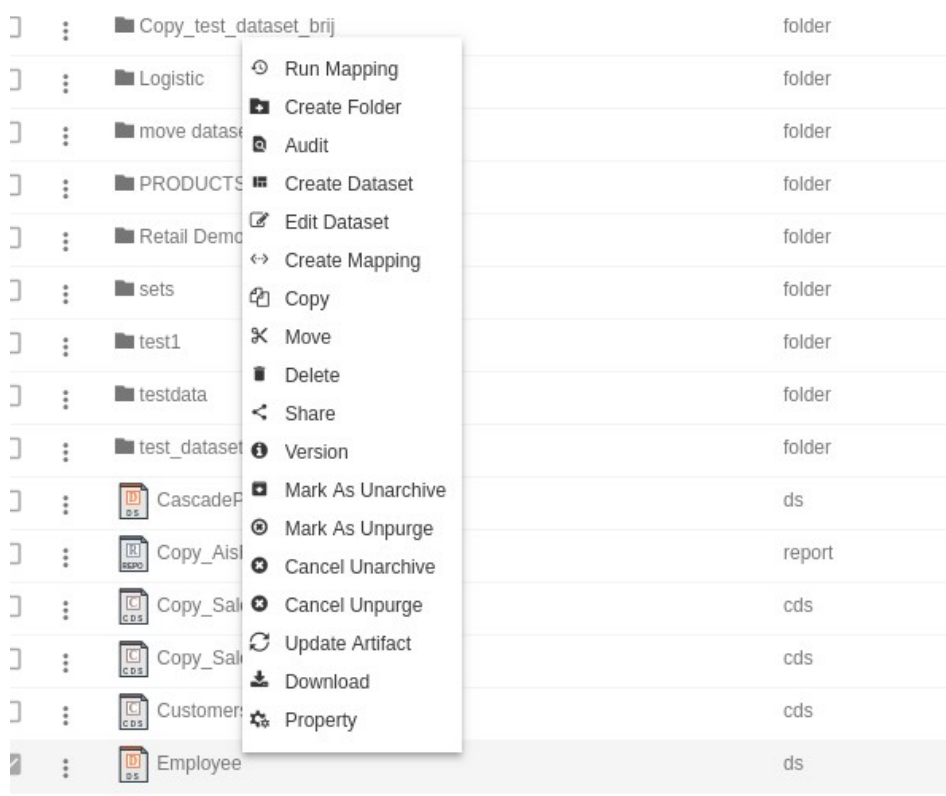
2. Here we are using Employees.ds for the purpose of understanding in this tutorial.
3. The following dialog box will appear on clicking edit dataset:

4. Make the changes you would like to changes to the selected Dataset (Note: Name cannot be updated from Edit Dataset option, in order to update the Dataset Name one should use the Properties option from the context menu instead)
5. Finally click **Submit** to save the changes to the Dataset.

Copy

- There are two ways in which a user can copy a dataset in the AIV application:-

1. By clicking on the copy icon **Copy** located at the bottom most toolbar.
2. By right clicking the dataset you want to copy. We will use **Customers** dataset in this tutorial for the purpose of understanding.

	File Name	Type
☐ ⋮	📁 test1	folder
☐ ⋮	📁 testdata	folder
☐ ⋮	📁 test_dataset_	folder
☐ ⋮	📄 CascadeP	ds
☐ ⋮	📄 Copy_AisF	report
☐ ⋮	📄 Copy_Sale	cds
☐ ⋮	📄 Copy_Sale	cds
☑ ⋮	📄 Customers	cds
☐ ⋮	📄 Employee	ds
☐ ⋮	📄 exam data	ds
☐ ⋮	📄 fighter planes details	ds

Menu:
- ⏱ Run Mapping
- 📁 Create Folder
- Audit
- Create Dataset
- Edit Dataset
- ↔ Create Mapping
- Copy
- ✂ Move
- 🗑 Delete
- < Share
- ⓘ Version
- Mark As Unarchive
- Mark As Unpurge
- Cancel Unarchive
- Cancel Unpurge
- Update Artifact
- ⬇ Download
- Property
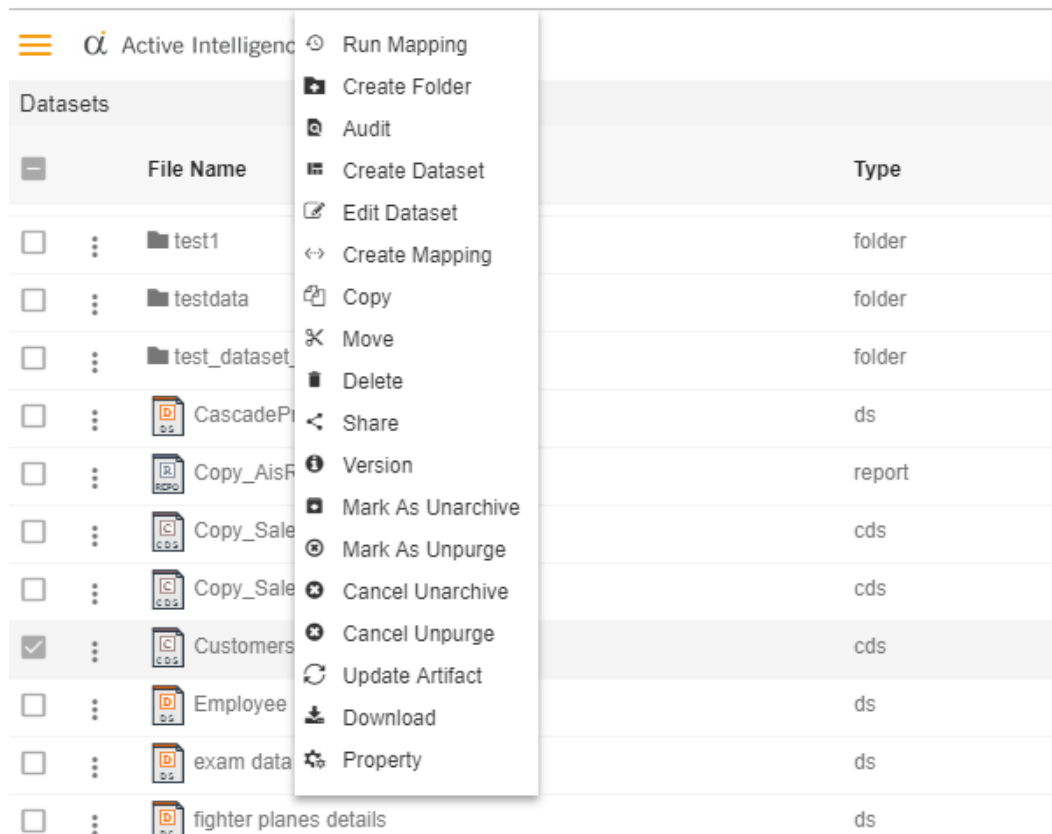
- Now perform the following steps in order to copy the dataset Employees:-
- Click on Copy using one of the methods mentioned above which will open the following popup..
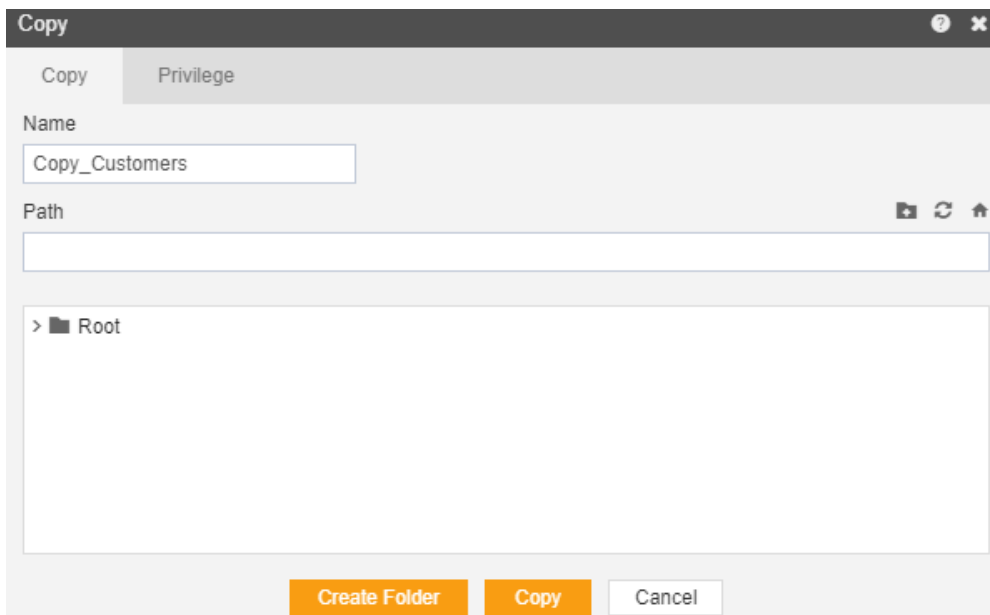
- The default name will be Copy_Customers. You can provide your own name while copying a dataset.
- In order to provide copy destination, you can select any of the folders present in the popup or can create a new folder by selecting the folder where new folder must be created and clicking on Create Folder as follows:-
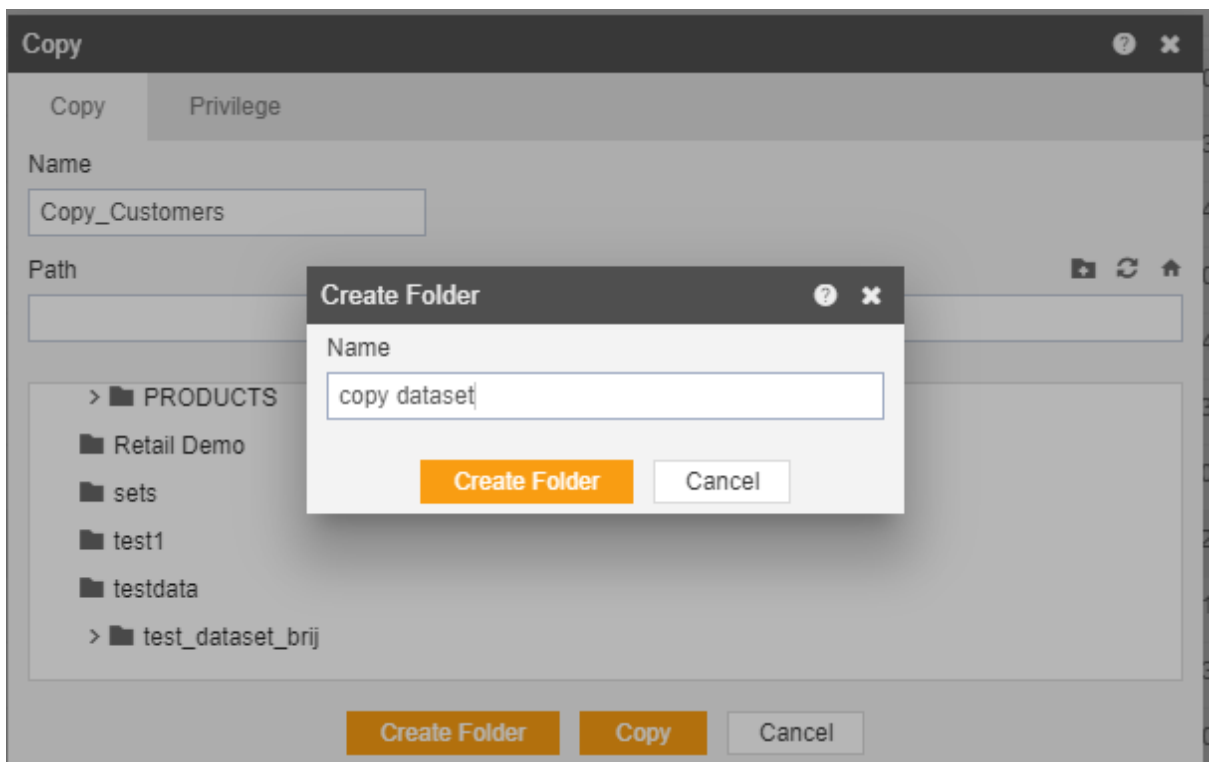
- Here we have created a folder named copy dataset within root where we will copy our Customers dataset.
- Select copy dataset from the list shown below:-
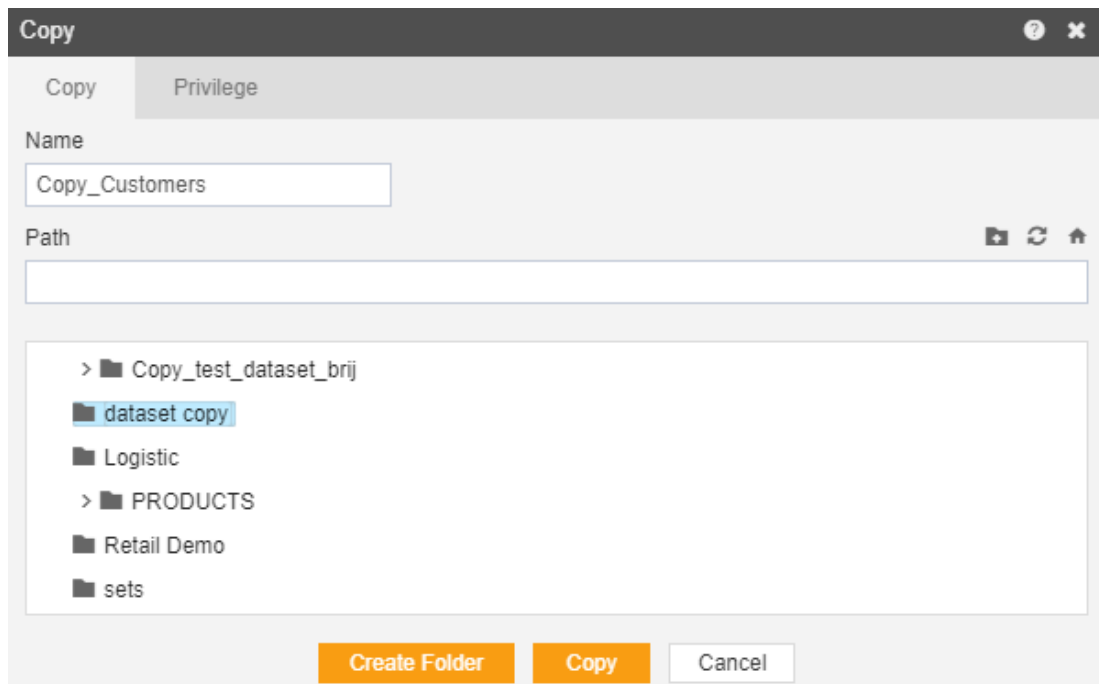
- In order to assign privileges to the design, click on the privileges tab next to the copy tab. By default, Copy current privileges and visibility checkbox will be checked which will retain the same privileges and visibility of the original design in the copied version.
- If you want to assign privileges, uncheck Copy current privileges and visibility checkbox.
- The user can select other users with whom the copied design will shared from the list of available users or search them in the search user bar.
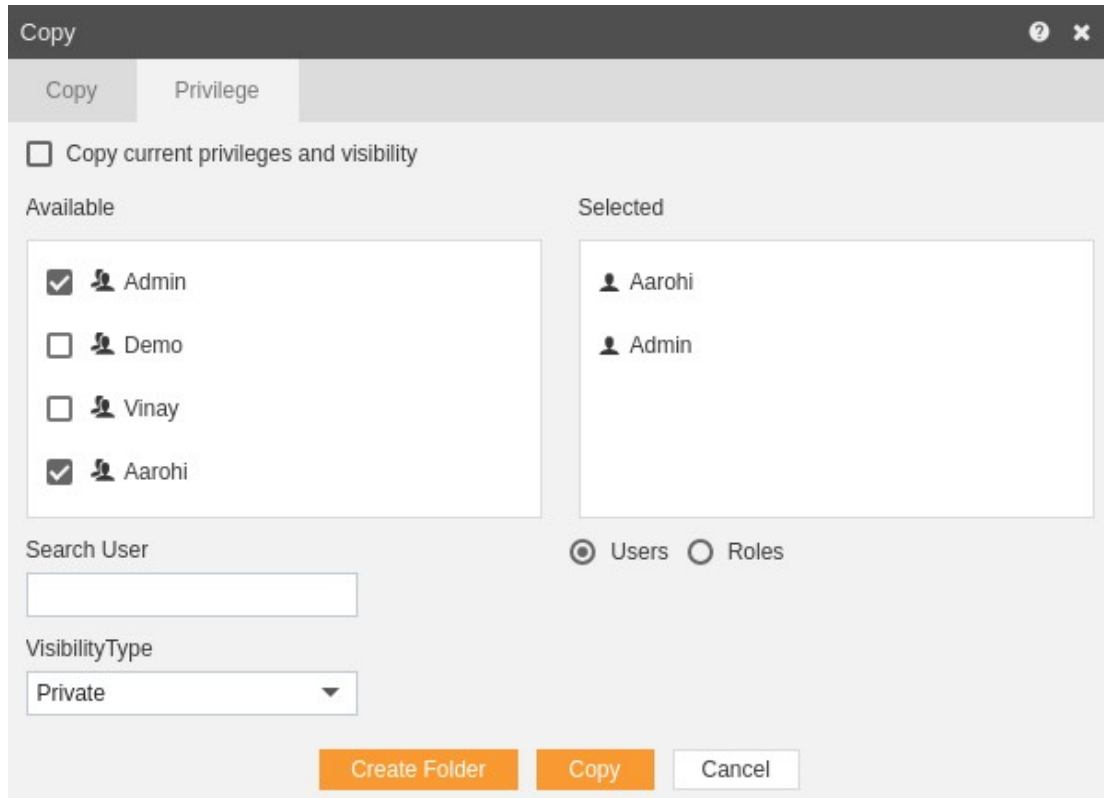
- In the similar manner, user can apply privileges to different user roles as follows:-

- The user can also search for roles in the Search Role bar.
- Visibility is used to mention who all can view the report and is of following three types:-

1. **Private:-** It means only the current user can view the file.
2. **Internal:-** It means all the users within the organization can view the file.
3. **Public:-** It means anyone can view the file.

- The user can select the visibility from the dropdown menu as shown above.

- In case of any further help, the user can click on the [?] icon to access the AIV help documents.
- Finally, in order to copy the design, click on the Copy button.
- If the user is not satisfied and wants to cancel the copy request, he can do this by clicking on cancel button next to copy or by clicking on [X] button next to the [?] icon.
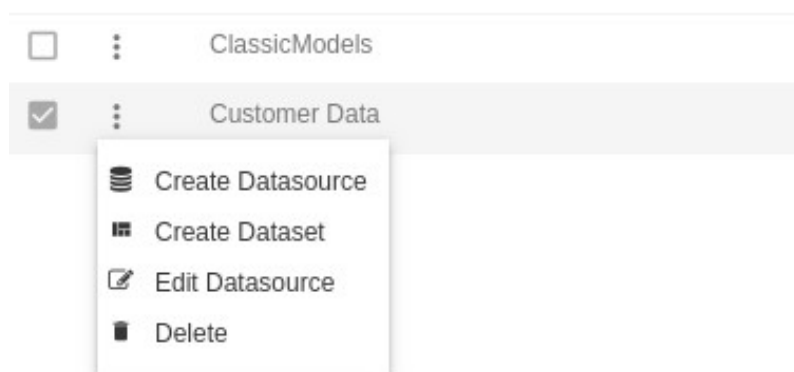- You can see the Copy_Customers appears in the explain folder by opening it.

In a similar manner, you can also perform the copy operation on the folders selecting the folder you desire to copy and choosing the copy icon from the toolbar, or by right-clicking the folder and selecting the copy option from the elapses shown.

Move

- There are two ways in which a user can move a dataset in the AIV application:-

1. By clicking on the move icon [✂ Move] located at the bottom most toolbar.
2. By right clicking the report you want to move. We will use **Employee List** report in this tutorial for the purpose of understanding.
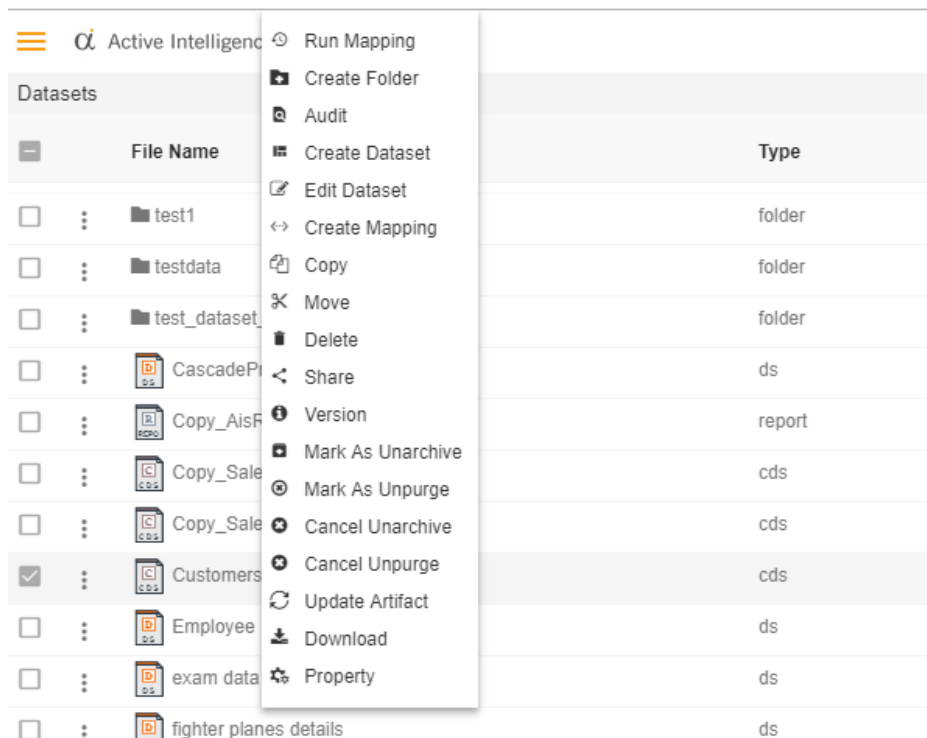
- Now perform the following steps in order to move the report Employee List:-
  1. Click on Move using one of the methods mentioned above which will open the following popup..
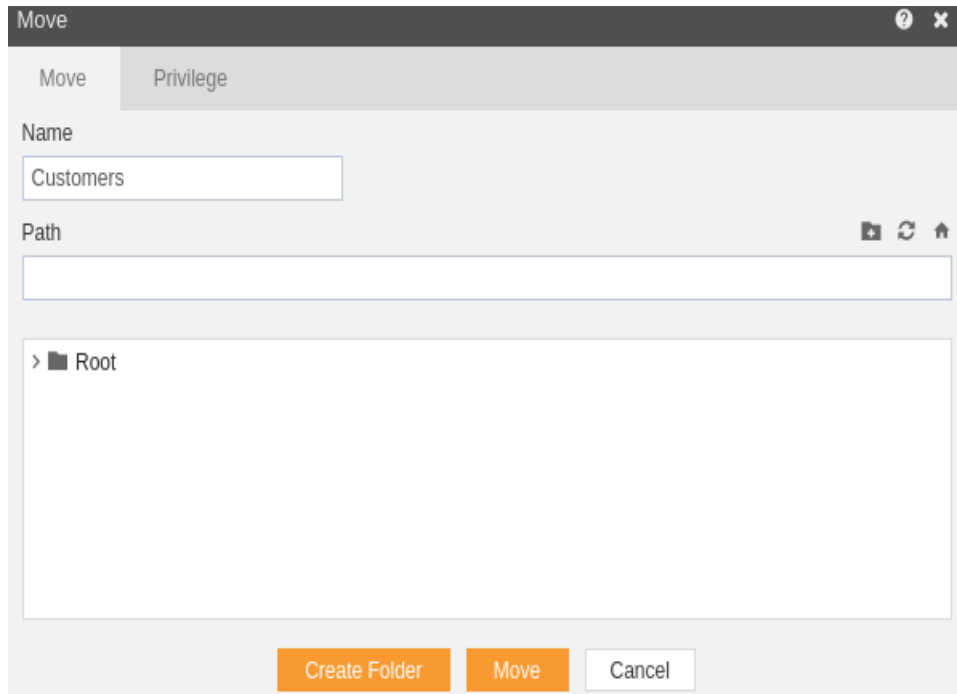
  2. The default name will be Customers. You can provide your own name while moving a report.
  2. In order to provide move destination, you can select any of the folders present in the popup or can create a new folder by selecting the folder where new folder must be created and clicking on Create Folder as follows:-
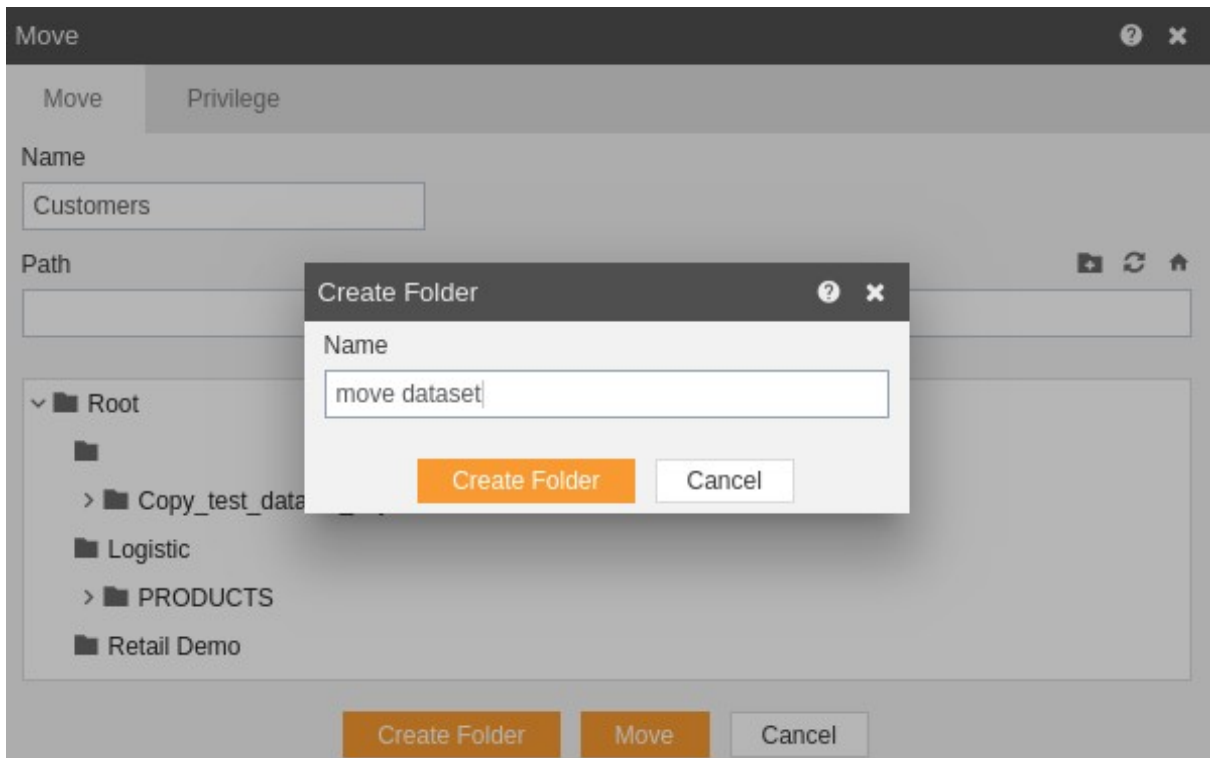
4. Here we have created a folder named move dataset within root where we will copy our Customers dataset.

4. Select move dataset from the list shown below:-
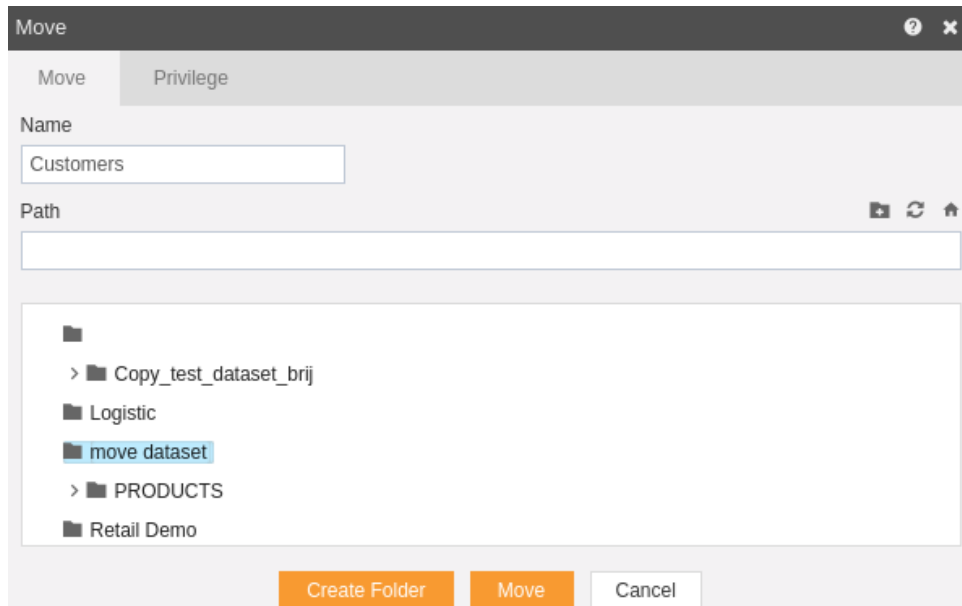
6. In order to assign privileges to the report, click on the privileges tab next to the move tab. By default, Copy current privileges and visibility checkbox will be checked which will retain the same privileges and visibility of the original report in the moved version.

6. If you want to assign privileges uncheck Copy current privileges and visibility checkbox.

6. The user can select other users with whom the moved report will shared from the list of available users or search them in the search user bar.
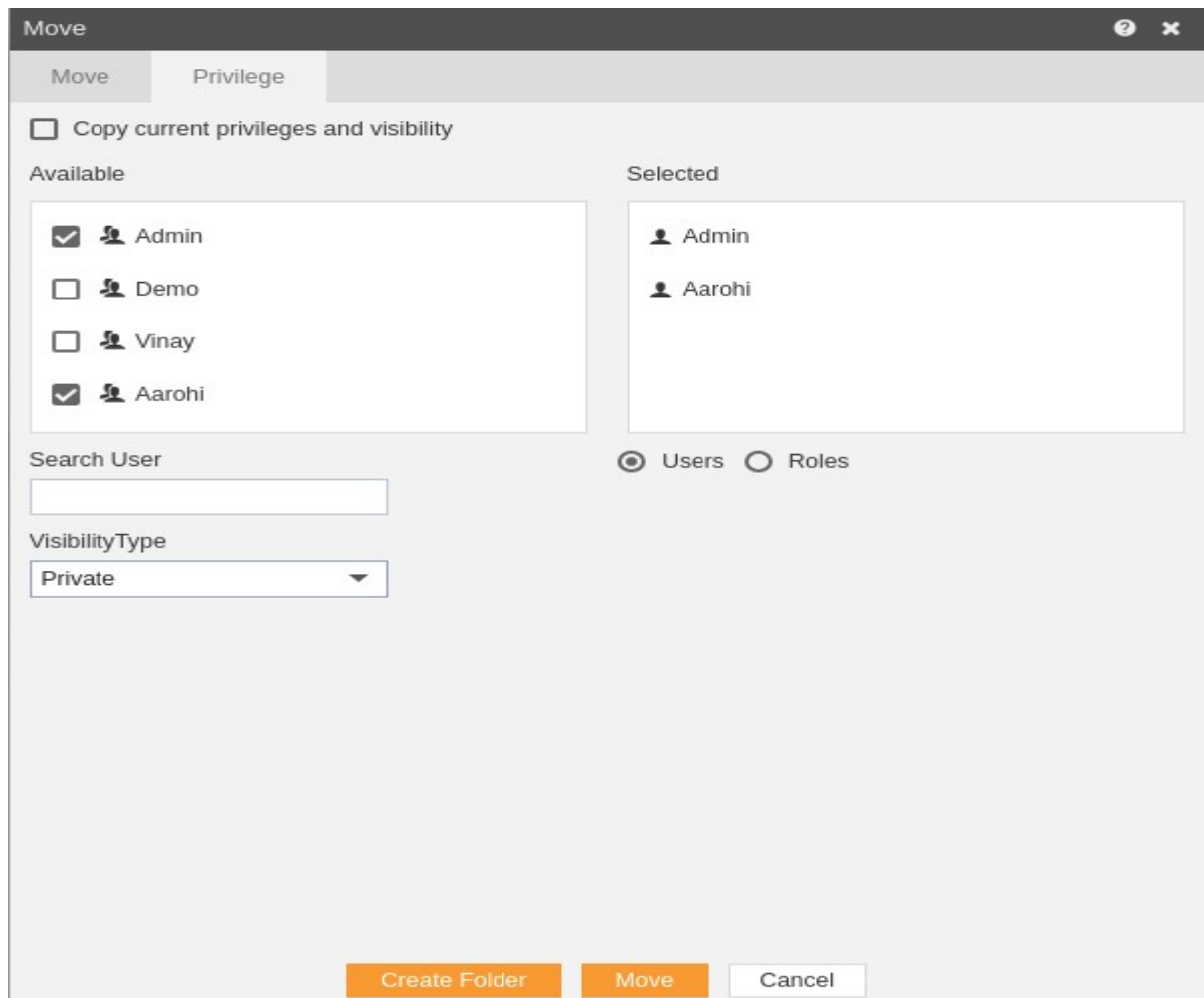
9. In the similar manner, user can apply privileges to different user roles as follows:-
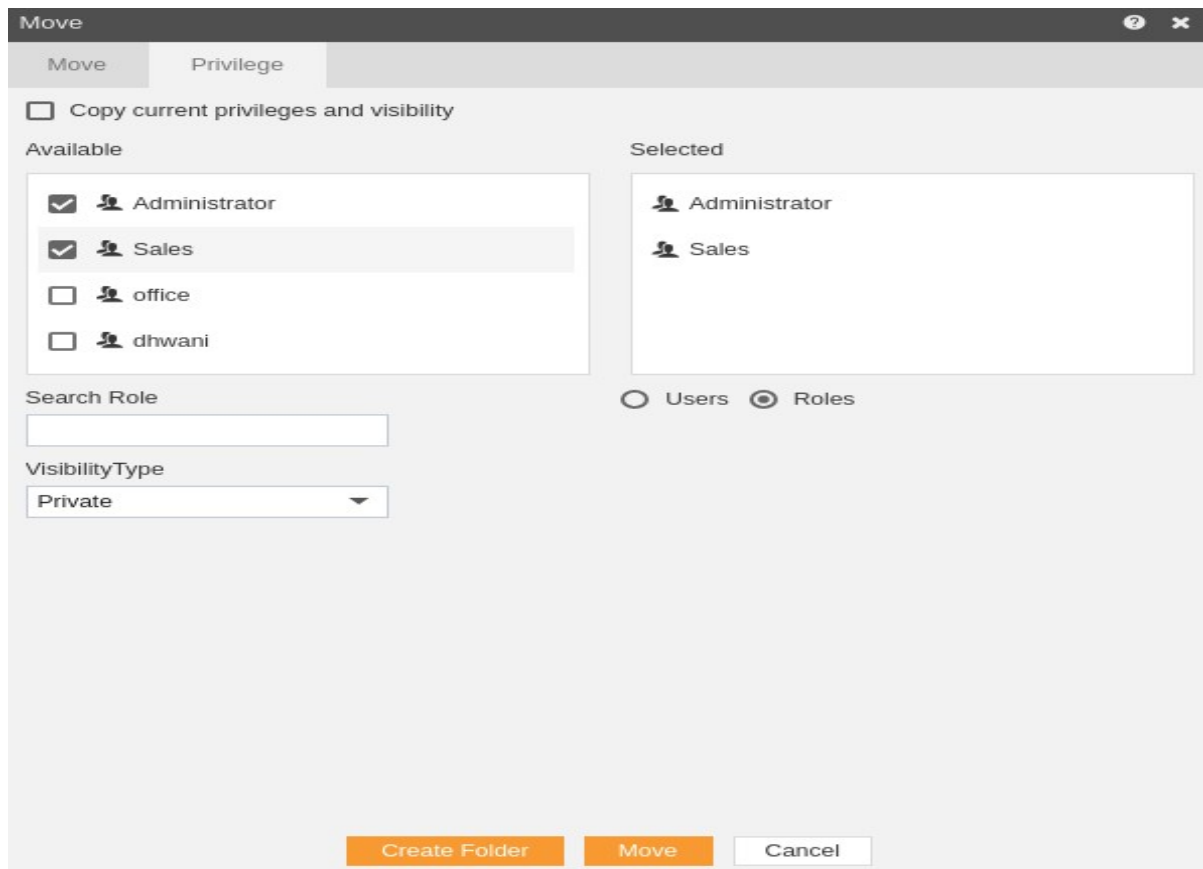
10. The user can also search for roles in the Search Role bar.
10. Visibility is used to mention who all can view the report and is of following three types:-
   - **Private:-** It means only the current user can view the file.
   - **Internal:-** It means all the users within the organization can view the file.
   - **Public:-** It means anyone can view the file.

12. The user can select the visibility from the dropdown menu as shown above.

12. In case of any further help, the user can click on the 🛈 icon to access the AIV help documents.
12. Finally, in order to move the report, click on the Move button.
12. If the user is not satisfied and wants to cancel the move request, he can do this by clicking on cancel button next to move or by clicking on ✖ button next to the 🛈 icon.
12. As the report is moved, it will removed from the Reports page and will be added to the explain_moved folder

- In a similar manner, you can also perform the move operation on the folders selecting the folder you desire to move and choosing the move icon from the toolbar, or by right-clicking the folder and selecting the move option from the elapses shown.

Delete

- There are two ways in which a user can delete a dataset in the AIV application:-
  1. By clicking on the delete icon 🗑 Delete located at the bottom most toolbar.
  2. By right clicking the report you want to delete. We will use **t1.ds** dataset in this tutorial for the purpose of understanding.
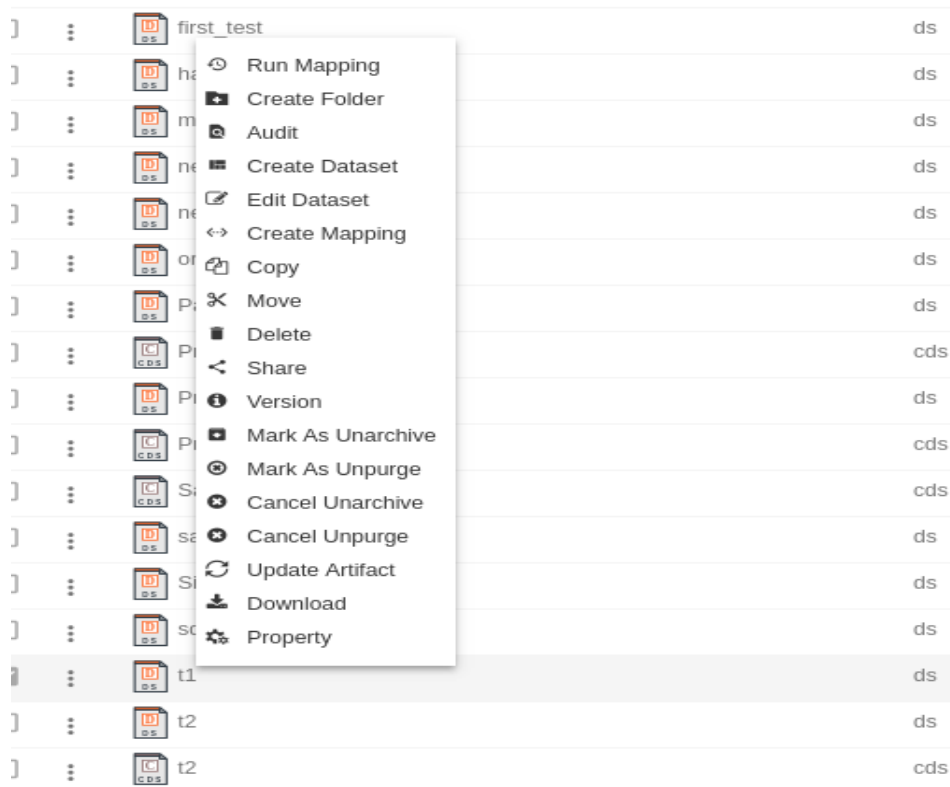
- Finally press on delete after selecting the dataset using any one of the above mentioned methods which will open the following popup:-
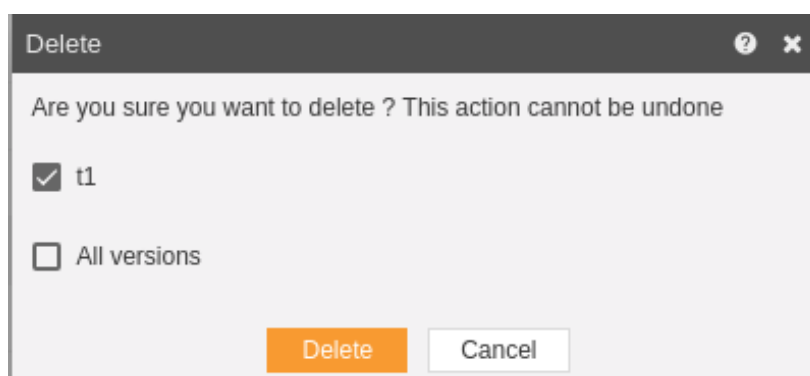
- You can select to delete current version or all versions of a dataset in case it has multiple versions.
- The dataset will be deleted and a message will be displayed report deleted successfully.
- In a similar manner, you can also perform the delete operation on the folders selecting the folder you desire to move and choosing the move icon from the

toolbar, or by right-clicking the folder and selecting the move option from the elapses shown.

Share

- There are two ways in which a user can share a dataset in the AIV application:-
 1. By clicking on the share icon ◁ Share located at the bottom most toolbar.
  2. By right clicking the dataset you want to share. We will use **Customers** dataset in this tutorial for the purpose of understanding.
- Now perform the following steps in order to share the dataset:
  1. Click on Share using one of the methods mentioned above which will open the following popup.
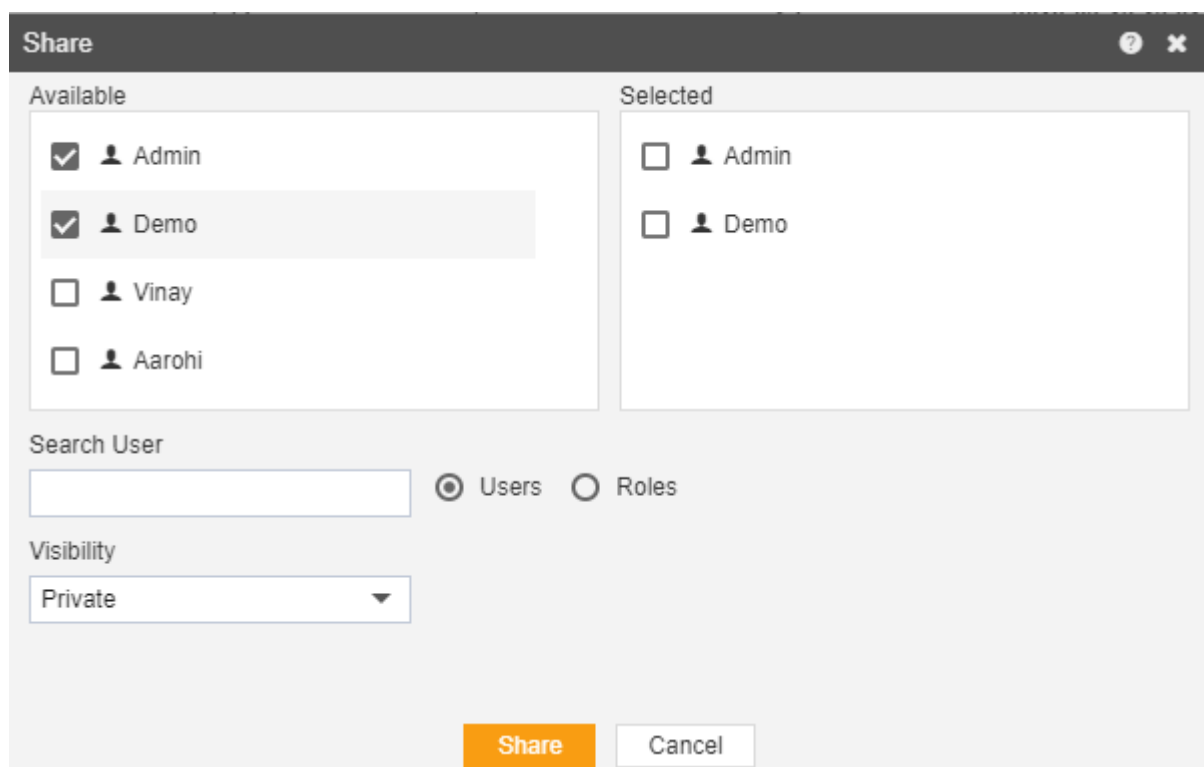
2. The user can select other users with whom the dataset will shared from the list of available users or search them in the Search User.

3. In a similar manner, the user can select different user roles with whom the report will be shared as follows:-
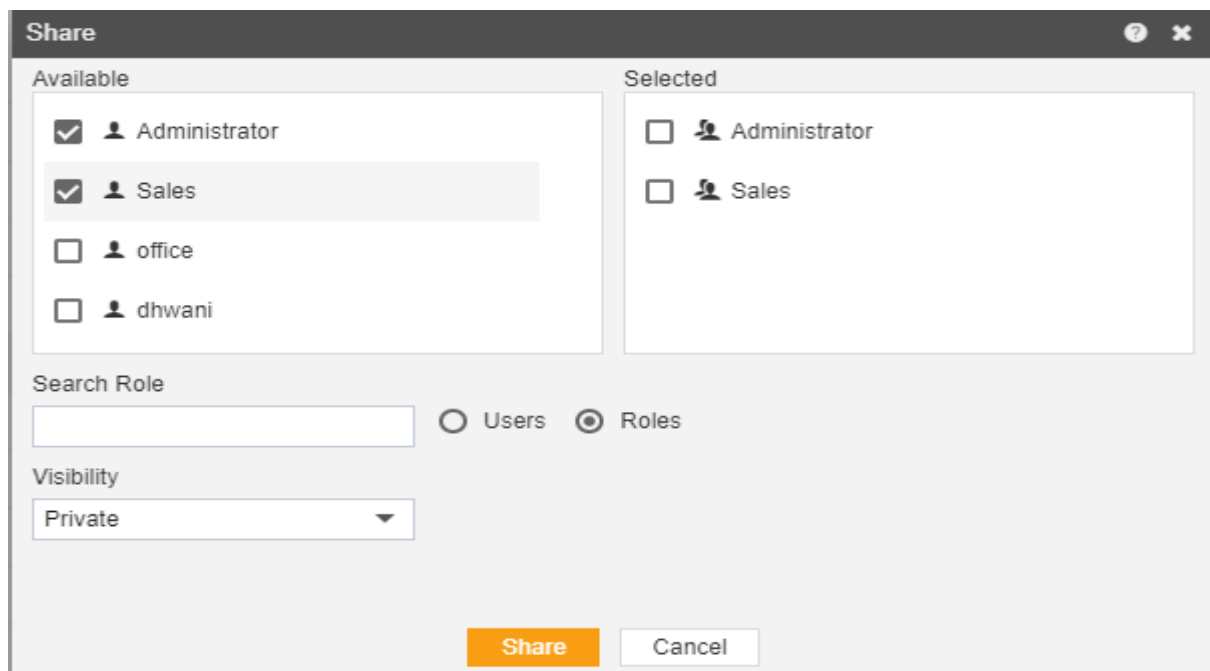
4. The user can also search for roles in the Search Role.
4. Visibility is used to mention who all can view the report and is of following three types:-
   - **Private:-** It means only the current user can view the file.
   - **Internal:-** It means all the users within the organization can view the file.
   - **Public:-** It means anyone can view the file.

6. The user can select the visibility from the dropdown menu as shown above. Select Internal visibility for our reference.

6. In case of any further help, the user can click on the icon to access the AIV help documents.
6. Finally, in order to share the dataset, click on the share button.
6. If the user is not satisfied and wants to cancel the share request, he can do this by clicking on cancel button next to share or by clicking on button next to the icon.
6. As the dataset is shared with user named Demo, the dataset will be visible in the Dataset section when login is performed with the credentials of user Demo as follows:-

|		File Name	Type	Full Path	Owner	Last Updated	Version	Options
☐	⋮	Customers	cds	/	Admin	2019-02-23 11:46:21	3	
☐	⋮	Employee	ds	/	Admin	2019-03-19 17:14:48	2	⟳
☐	⋮	newtest	ds	/	Admin	2019-03-08 10:39:03	1	⟳
☐	⋮	Product Details	cds	/	Admin	2019-02-20 10:50:02	1	
☐	⋮	Sales Representative	cds	/	Admin	2019-02-20 10:50:02	1	
☐	⋮	Top 5 Customers	cds	/	Admin	2019-02-20 10:50:02	1	
☐	⋮	test_dataset_brij	folder	/	Admin		1	
☐	⋮	Copy_test_dataset_brij	folder	/	Admin		1	

- In a similar manner, you can also perform the share operation on the folders selecting the folder you desire to share and choosing the share icon from the toolbar, or by right-clicking the folder and selecting the share option from the elapses shown.

Create Dataset Mapping

Run Dataset Mapping

Schedule Dataset

- The schedule Dataset option is used when you want to schedule your dataset. It creates Cache Dataset (.cds). There are two methods to schedule the datasets:-

1. Time scheduling:- This includes three methods to schedule events.
- Right now:- If you want to schedule the dataset at the current moment.
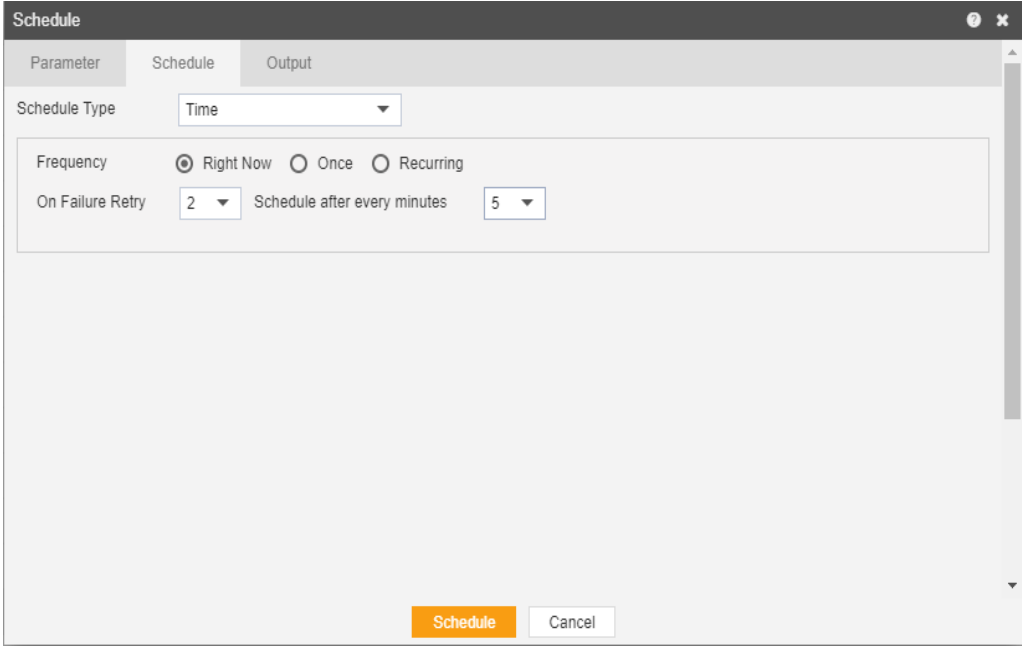
- **Once:-** The dataset will run once at the specific time on the day mentioned by the user.
- **Recurring:-** If you want to run your dataset for multiple times within an hour, day, week, month or year.

2. **Event Scheduling:-** When the user want to schedule their event, after some event is fired, then this type of scheduling comes into picture.

- You can schedule a dataset by clicking on 🕐 under the Options column.
- Let us understand each of them in detail now:-

Time Scheduling

- The events can be scheduled at different moments of time based on the requirement of the user.

Right now
- In order to schedule the dataset at the present moment following steps   should be followed:-
- We will be using Employees.ds for the purpose of understanding.
- Click on 🕐   which will open the following dialog box:-

- Go to the schedule tab as shown in the figure above. By default Time will be selected else select schedule type time from the drop down menu.
- By default Right Now will be selected as the output frequency.
- You can also specify how many times the report should re-execute in case of failure and after how much duration from the drop down menu shown in the figure. For instance, in our case the report will be executed twice in case of failure within duration of 5 minutes.
- In order to specify the output, go to the output tab as follows:-

- Enter the name by which you want to schedule the dataset in the Name text area, also provide optional suffix if required.
- You can also specify event on success/failure of dataset which will trigger an event and execute all the waiting for event dataset. We will discuss about this in detail in the event scheduling.
- You can also specify the delivery path on your computer where the datasets will be downloaded as follows.

- The user can also send the dataset as email to the other users using following steps:-

- Select the users and the roles from the drop down menu.
- Enter your email address/addresses to which you want to send the dataset via email.
- Select a template from the dropdown, we have selected Default template for our example.
- Click on Schedule [Schedule] icon in order to schedule the report.
- In case of any further help, the user can click on the [?] icon to access the AIV help documents.

- If the user is not satisfied and wants to cancel the move request, he can do this by clicking on cancel button next to move or by clicking on ✖ button next to the ❓ icon.

The dataset is scheduled and converted to .cds format in the dataset section. The user can see the schedule request in the Request section of AIV application. This section displays all the datasets that have completed, running, waiting for event or scheduled. In case of dataset schedule failure, error is also displayed on this page.

Once

- In order to schedule the dataset once during a hour, day, week, month or year following steps should be followed:-
- We will be using Employees.ds for the purpose of understanding.
- Double click on the dataset which will open the following dialog box:-

- Go to the schedule tab as shown in the figure above. By default Time will be selected, else select schedule type time from the drop down menu.
- Choose Once in the Frequency.
- You can also specify how many times the dataset should re-execute in case of failure and after how much duration from the drop down menu shown in the figure. For instance, in our case the dataset will be executed once in case of failure within duration of 5 minutes.
- Click on Share in case you want to share the dataset with other users

- Similarly, you can share the dataset with different user roles as follows:-

- Here the Visibility is kept Internal for this example.
- If you want you dataset to be approved before sending to other users, then check Approval Require.
- Send Reminder specifies how many reminder should be sent.
- After days specifies after how many days should the Reminder be sent again.
- Approved by specifies the user name, which is Admin in our case.
- In order to specify the output, go to the output tab as follows:-

- Enter the name by which you want to schedule the dataset in the Name text area, also provide optional suffix if required.
- You can also specify event on success/failure of dataset which will trigger an event and execute all the waiting for event datasets. We will discuss about this in detail in the event scheduling.
- You can also specify the delivery path on your computer where the datasets will be downloaded as follows.

-

- The user can also send the report as email to the other users using following steps:-

- Select the users and the roles from the drop down menu.
- Enter your email address/addresses to which you want to send the dataset via email.
- Select a template from the dropdown, we have selected Default template for our example.
- Click on Schedule [Schedule] icon in order to schedule the dataset.
- In case of any further help, the user can click on the [?] icon to access the AIV help documents.
- If the user is not satisfied and wants to cancel the move request, he can do this by clicking on cancel button next to move or by clicking on [x] button next to the [?] icon.

The dataset is scheduled and output is displayed. The user can see the schedule request in the Request section of AIV application. This section displays all the reports that have completed, running, waiting for event or scheduled. In case of report failure, error is also displayed on this page.

Recurring

- In order to schedule the dataset in a recurring pattern during a hour, day, week, month or year following steps should be followed:-
- We will be using Employees.ds for the purpose of understanding.

- Go to the schedule tab as shown in the figure above. By default Time will be selected, else select schedule type time from the drop down menu.
- Choose Recurring in the Frequency.
- Mention the Start time and End Time by setting the time as shown in the figure depicted above.
- You can provide optional description for your reference.
- Now, you have to mention recurrence pattern which can be daily, weekly, monthly, yearly or advance.
- In Daily, you can mention the dataset to recur after specify number of days or to schedule every weekday at specified scheduled time.

- You can specify dataset to run weekly on specified day/days as follows:-

- Here we have mentioned that the dataset will run on every Thursday and Saturday at the scheduled time.

- In the above figure, we have mentioned that dataset will run every first day each month at scheduled time till the end time, or you can mention like First Monday of every month as mentioned above.

- You can also specify report to run every year, as mentioned above, here the dataset will run every year on January 1 at scheduled time or you can select like First Monday of every February at scheduled time till the end time.

- To understand in detail about expressions of this type click on which will guide you in detail about how to use these expressions.
- You can also specify how many times the dataset should re-execute in case of failure and after how much duration from the drop down menu shown in the figure. For instance, in our case the report will be executed once in case of failure within duration of 5 minutes.
- Click on Share in case you want to share the dataset with other users.
- Similarly, you can share the dataset with different user roles as follows:-

- Here the Visibility is kept Internal for this example.

- If you want you dataset to be approved before sending to other users, then check Approval Require.
- Send Reminder specifies how many reminder should be sent.
- After days specifies after how many days should the Reminder be sent again.
- Approved by specifies the user name, which is Admin in our case.
- In order to specify the output, go to the output tab as follows:-

- Enter the name by which you want to schedule the report in the Name text area, also provide optional suffix if required.
- You can also specify event on success/failure of report which will trigger an event and execute all the waiting for event reports. We will discuss about this in detail in the event scheduling.
- You can also specify the delivery path on your computer where the reports will be downloaded as follows.

- The user can also send the dataset as email to the other users using following steps:-

- Select the users and the roles from the drop down menu.
- Enter your email address/addresses to which you want to send the dataset via email.
- Select a template from the dropdown, we have selected Default template for our example.
- Click on Schedule ⬚ [Schedule] icon in order to schedule the report.
- In case of any further help, the user can click on the ⬚ icon to access the AIV help documents.
- If the user is not satisfied and wants to cancel the move request, he can do this by clicking on cancel button next to move or by clicking on ⬚ button next to the ⬚ icon.

The dataset is scheduled and output is displayed in pdf format in the new tab. The user can see the schedule request in the Request section of AIV application. This section displays all the reports that have completed, running, waiting for event or scheduled. In case of schedule failure, error is also displayed on this page.

Event Scheduling

In order to schedule the report based on event following steps should be followed:-

- We will be using Employees.ds for the purpose of understanding.
- Click on 🕐 which will open the following dialog box:-

Go to the schedule tab as shown in the figure above. By default Time will be selected hence select schedule type Event from the drop down menu.

- Trigger on Events define events on the trigger of which report will be scheduled.
- Currently event 1 has been created for this example, you can create an event of your own by clicking on ⊕ which will open the following dialog box.

- Here we have created event numbered two which is an event related to Dataset as mentioned in Event Type.
- You can provide optional description of event as shown above.
- You can also send an email to different users when event is fired.
- For this check on event mail and enter following details.
- Enter Users or Roles from the dropdown.
- Enter the email address of the user who you want to send the email.
- Select the template from dropdown, Default for our case and hit Submit.

- If you want some external event to fire click on the which will guide you regarding necessary steps to perform the same.

- Now you have successfully created an event which will be visible in the dropdown as follows:-

- We will use predefined event 1 for our example so select event 1.
- Click on Share in case you want to share the dataset with other users or user roles
- Here the Visibility is kept Internal for this example.
- If you want you dataset to be approved before sending to other users, then check Approval Require.
- Send Reminder specifies how many reminder should be sent.
- After days specifies after how many days should the Reminder be sent again.
- Approved by specifies the user name, which is Admin in our case.
-

- Enter the name by which you want to schedule the dataset in the Name text area, also provide optional suffix if required.

- You can also specify event on success/failure of dataset which will trigger an event and execute all the waiting for event reports. We will discuss about this in detail in the event scheduling.
- You can also specify the delivery path on your computer where the reports will be downloaded as follows.

- The user can also send the report as email to the other users using following steps:-

- Select the users and the roles from the drop down menu.
- Enter your email address/addresses to which you want to send the dataset via email.
- Select a template from the dropdown, we have selected Default template for our example.
- Click on Schedule [Schedule] icon in order to schedule the dataset.
- In case of any further help, the user can click on the ⚙ icon to access the AIV help documents.
- If the user is not satisfied and wants to cancel the schedule request, he can do this by clicking on cancel button next to move or by clicking on ✖ button next to the ⚙ icon.

- The dataset is scheduled and you can check that in Requests section Requests tab, go to Waiting for event which shows following screen where the dataset is waiting for the event to trigger.

- You can trigger an event with another report as follows:-

- Here we schedule a dataset named Event Trigger which will trigger event 1 when run successfully.
- After this event is triggered, our Employee dataset will be executed.

Unarchive

- The main purpose of unarchive in an AIV application is to enable the user to save some of his important files from being archived.
- Usually, each type of file is assigned to be archived after certain number of days by the Administrator, after which the file goes to the Archive mode.
- Once a file is marked as unarchive, then it will not get deleted when the cycle for archive runs in the AIV application.
- In order to change the settings of the file to be archived/unarchived you need to contact the Administrator.

To Unarchive file and folders follow these steps:

1. Select the file or folders you want to Mark as Unarchive . (Note: multiple file and folders or combination of file and folders can be selected).

2. Right click and select the [Unarchive] button from the context menu or directly from the bottom menu as shown in the image below:

- Here Customers.cds dataset is marked as unarchive and hence it will not get deleted when all other dataset files are archived.
- You can check the archive status of the file by clicking on [Property] as mentioned in the above figure.

- The "Is Archivable" property of Customers.cds is False which means this file will not be archived when the cycle for Archive runs.
- In order to run archive jobs, go to the Requests of the Request section.

- Click on the Archive Job in order to perform the Archive which will open the following dialog box.

- Click on **Run Jobs** in order to run the Archive Jobs. The detailed description regarding the same will be given in the Requests section of the AIV application.
- Only the users with administrator rights can run the archive jobs.
- The administrator user can Login to Archive mode to see the details of all the files that have been archived as follow

α

Hi, Welcome to **Active Intelligence**

👤 Admin

👁 ········

Login

Login to Archive

HELP   VIDEOS

- After logging in, following screen will be displayed which shows all the datasets which have been archived.

		File Name	Type	Full Path	Owner	Last Updated	Version	Options
☐	⋮	📁 aarohi_report	folder	/	Admin	2019-03-11 14:49:12 IST	1	
☐	⋮	📁 explain_copy	folder	/	Admin	2019-03-18 16:42:08 IST	1	
☐	⋮	📁 explain_move	folder	/	Admin	2019-03-18 17:49:41 IST	1	
☐	⋮	📁 new report	folder	/	Admin	2019-03-12 17:12:03 IST	1	
☐	⋮	📁 New Root	folder	/	Admin	2019-03-09 10:39:06 IST	1	
☐	⋮	📁 Output	folder	/	Admin	2019-03-13 13:01:26 IST	1	
☐	⋮	📁 Templates	folder	/	Admin	2019-02-26 18:28:56 IST	1	
☐	⋮	📁 test_report	folder	/	Admin	2019-03-18 16:38:11 IST	1	
☐	⋮	📁 test_share	folder	/	Aarohi	2019-03-11 19:01:31 IST	1	
☐	⋮	📄 ProductList	pdf	/	Admin	2019-03-13 10:20:30 IST	1	

- You can cancel the unarchive by right clicking the dataset and selecting cancel unarchive:

- Now check properties to see that "Is Archivable" is true:-

Unpurged

- The main purpose of the unpurge in an AIV application is to enable the user to save some of his important files from being deleted permanently.
- Usually, each type of file is assigned to be purged after certain number of days by the Administrator, after which the file gets deleted permanently.

- Once a file is marked as unpurge, then it will not be deleted when the cycle for purge runs in the AIV application.
- In order to change the settings of the file to be purged/unpurged you need to contact the Administrator.

To Unpurge file and folders follow these steps:

3. Select the file or folders you want to Mark as Unpurge . (Note: multiple file and folders or combination of file and folders can be selected).

4. Right click and select the   ⊛ Unpurge   button from the context menu or directly from the bottom menu as shown in the image below:

- Here Customers.cds dataset is marked as unpurge and hence it will not get deleted when all other files are purged.
- You can check the purge status of the file by clicking on ⚙ Property   as mentioned in the above figure.

- The "Is Purgeable" property of Customers.cds is False which means this file will not be archived when the cycle for Purge runs.
- In order to run purge jobs, go to the Requests of the Request section.

- Click on the Purge Job in order to perform the Archive which will open the following dialog box.

- Click on [Run Jobs] in order to run the Purge Jobs. The detailed description regarding the same will be given in the Requests section of the AIV application.
- Only the users with administrator rights can run the archive jobs.

- The administrator user can Login to Archive mode to see the details of all the files that have been purged as follow

- After logging in, following screen will be displayed which shows all the Reports which have been purged.

		File Name	Type	Full Path	Owner	Last Updated	Version	Options
☐	⋮	aarohi_report	folder	/	Admin	2019-03-11 14:49:12 IST	1	
☐	⋮	explain_copy	folder	/	Admin	2019-03-18 16:42:08 IST	1	
☐	⋮	explain_move	folder	/	Admin	2019-03-18 17:49:41 IST	1	
☐	⋮	new report	folder	/	Admin	2019-03-12 17:12:03 IST	1	
☐	⋮	New Root	folder	/	Admin	2019-03-09 10:39:06 IST	1	
☐	⋮	Output	folder	/	Admin	2019-03-13 13:01:26 IST	1	
☐	⋮	Templates	folder	/	Admin	2019-02-26 18:28:56 IST	1	
☐	⋮	test_report	folder	/	Admin	2019-03-18 16:38:11 IST	1	
☐	⋮	test_share	folder	/	Aarohi	2019-03-11 19:01:31 IST	1	
☐	⋮	ProductList	pdf	/	Admin	2019-03-13 10:20:30 IST	1	

- You can cancel the unpurged by right clicking the dataset and selecting cancel unarchive:

⋮ ▪ Copy_test_d	� Run Mapping	folder
⋮ ▪ Logistic	📁 Create Folder	folder
⋮ ▪ move datase	🔍 Audit	folder
⋮ ▪ PRODUCTS	▦ Create Dataset	folder
⋮ ▪ Retail Demo	☑ Edit Dataset	folder
⋮ ▪ sets	↔ Create Mapping	folder
⋮ ▪ test1	⧉ Copy	folder
⋮ ▪ testdata	✂ Move	folder
⋮ ▪ test_dataset_	🗑 Delete	folder
⋮ 📄 CascadeP	< Share	ds
⋮ 📄 Copy_AisR	ℹ Version	report
⋮ 📄 Copy_Sale	▣ Mark As Unarchive	cds
⋮ 📄 Copy_Sale	👁 Mark As Unpurge	cds
⋮ 📄 Customers	⊗ Cancel Unarchive	cds
⋮ 📄 Employee	⊗ Cancel Unpurge	ds
	↻ Update Artifact	
	⬇ Download	
	⚙ Property	

- Now check properties to see that "Is Purgeable" is true:-

Properties   ❓ ✖

General

Name
Customers

Description

Owner
Admin

VisibilityType
INT

Default Version
3

Created On
2019-02-23 11:46:21

LastUpdated By
Admin

LastUpdated On
2019-02-23 11:46:21

Is Archivable
True

Is Purgable
True

Submit   Cancel

Audit

- Audit shows the actions like when the user created, uploaded or downloaded any particular file.
- Following image describes the audit option.

Version

- Version option shows the number of versions of the selected report as well as the version which user is using.
- Following is the image describing number of versions of selected dataset.

Download

- The User can download the selected alert by clicking download option from context menu.

Property

- Use Properties option of the file and folders for the following:
- To update the Name of the file and folders
- To change the Output Types of the File (Note: only applicable to files)
- To view file and folders Properties such as owner information, last updated by, file created date, archive and purge options and file visibility i.e. (Private, Internal, Public) and much more.
- To view the Property for the file or folder follow the steps below:

1. Select file or folder you wish to see properties for or update the information such as Name or Output Type by selecting ⚙ Properties from the context menu, following dialog box will appear as shown in the image below:

2. The Name can be updated (Note: The above image is taken from the Folder Properties, File Properties will have additional tab for Output Type which will enable users to select/unselect the file Output visibility Type.).

3. Finally click [Submit] button to save the changes to the file Properties, if any.

Annotations

- **Annotations** are critical or explanatory notes added to a text, image or other data. They are references that point to the specific part of data.
- **Annotations** enables users to add shapes and text to make information more meaningful for the business.
- **Annotations** section is located under **Master Data** from the main menu bar (Only users with **Annotations** privilege have access to this section)
- Annotations provides the user with the following functionality:-
    1. Create group
    2. Create item
    3. Edit
    4. Rename
    5. Delete
    6. Copy

Create group

- You can create new annotations group and item key using create group ⚙ in the Annotations section.
- Follow these steps to create a new Annotations group:-
    1. To create **Annotation** Group, click on ⚙ button from the list of top left corner icons.
    2. This will open the following dialog box:-
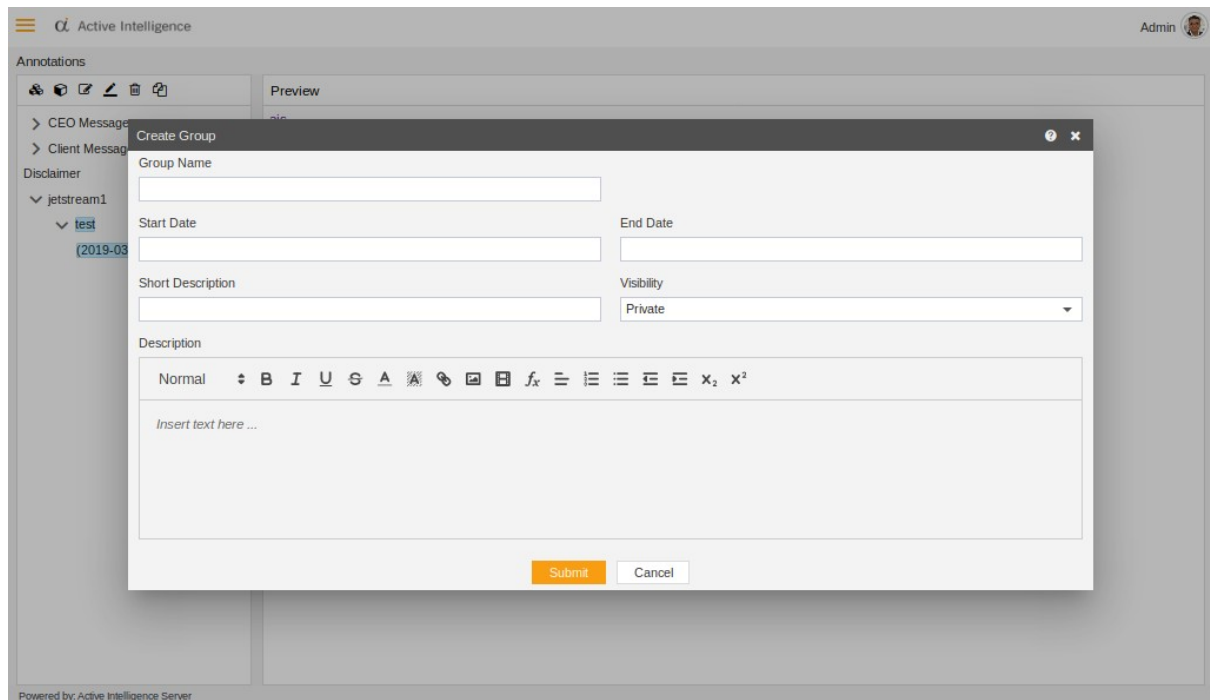
- Fill in the required fields in the Create Annotation:

1) Group Name - Group Name must be Unique (required field)

2) Start Date - Start date for your group Annotation (required field)

3) End Date - End Date for your group Annotations (not a required field)

4) Visibility Type - Select Visibility type from the drop-down list i.e. Private, Public or Internal (selecting Private will restrict the visibility to the file owner only, Internal will make the file available to the Internal users only, and selecting Public will extend file visibility to the end users as well.

5) Short Description - Helpful for user to know more about the group

6) Description - Detail description which will be sent to the consumers

- Finally, click on Submit button to create a new Annotation Group.
- All the groups user creates will be available under the Annotations as shown in the image below, the below example has three groups
  (Note: Groups can be identified by 🎳 icon)

Create Item

Create Item allows user to generate a key of its respective group.
Following image describes the use of create item.

- Click **Submit** button to generate the item.

Edit Annotation

- To Edit Annotations, follow these steps: (Only the users with Annotations privilege have access to this section)
- To Edit Annotations select the desire Group or Item Key.
- Click ✐ button from top left icons.
- The following dialog box will appear:

- Update the fields you would like to make changes to.

- Finally click on Submit button to apply the changes.

Rename

- Rename Annotation allows you to change the name of any existing Annotation Group or Item.
- To rename Annotations Group or Item key select the desire Group or Item Key.
- Select Group or Item you want rename and click ✐ button from top left icons.
- The following dialogue box will appear:
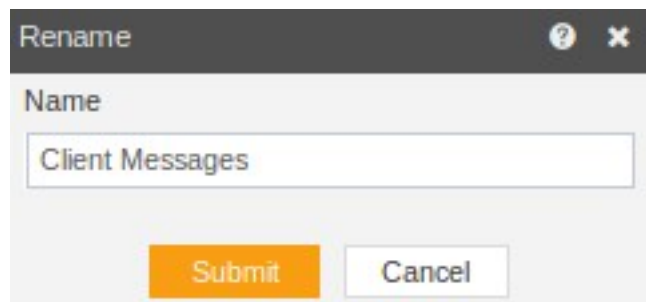
- Update name as desired

- Finally click on Submit button to rename the selected Annotation Group or Item.

Delete

- Annotation groups or annotation items can be deleted using delete option.
- To Delete Annotation Group or Item key, follow these steps:
- Select the Annotation Group or Item key you wish to delete and click 🗑 button from the top left icons
- The following dialog box will appear:
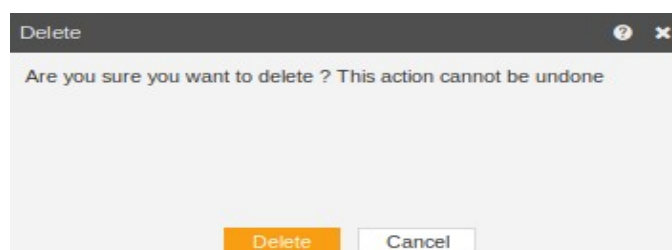
- Finally click ▪Delete button to permanently delete an annotation.

Copy

- Copy allows you to copy the desired annotation.
- It copies an annotation to the clipboard.
- Click 🗐 button to copy an annotation.

Parameters

- Parameter allows the user to input the value based on which the data/information will be displayed (Parameters are specific values entered by the user to determine what data to display), when you create a dataset and want to specify certain criteria to display a certain set of data from the dataset, Parameters are used.

- For example: In an ordered dataset, a user may want to view only orders in a particular region, or order over a certain amount, or maybe the orders that closed in the last 30 days, the easiest and most efficient ways to manage this is using the parameter for that dataset to filter value based on user input.

- Parameters section is located under Master Data from the main menu bar (Only users with Parameter privilege have access to this section)
- Parameters tab has the following items:
    o Create Parameter
    o Edit Parameter
    o Clone
    o Delete

Create Parameters
- To Create Parameter, follow these steps:
- There are multiple ways you can Create a Parameter (select any Parameter whilst in Parameter section and right click and select 📄 Create Parameter from the context menu, select 📄 Create from the footer menu bar
- Click on 📄 Create button from the footer menu bar to create a new Parameter
- The following dialog box will appear:

- Fill in the required fields in the Create Parameter form:

- Parameter Name - Parameter Name must be Unique, this will be used for linking the parameter when creating parameter dataset (required field)

- Prompt Text - To help the user when Parameter box prompts for input (required field)

- Data Type - Select the Data Type for the Parameter (required field)

- Format as - This is selected as a custom by default (required field)

- Display Type - User can decide how they would like Parameter value to be presented using the Display Type, there is three Display Type to choose from (required field):

- Text Box (Plain Text box where the user can put parameter value text, this can only be static)
  List Box (This can be static or dynamic)
  Radio Button (This can be static or dynamic)

- Help Text - This can be added if required (not a required field)

- The user can decide to enable the following option for the Parameter:

- Hidden - Parameter value will be applied, however, it will not be visible to end user

- Require - Currently in all the cases Parameter will be required whether the box is checked or unchecked.

- Dynamic - This option only gets active when Display Type is selected as List Box or Radio Button, the user can pull the parameter value dynamically from the Dataset.

- Select Dataset - This option will be enabled only when Dynamic checkbox is checked, the user must then select the dataset to pull the parameter value

- Display Text - Display text for the end user

- Value - Column name from where the values of the parameter will be displayed and applied

- Linked Parameter and Filter Column - This option is only required when creating a Cascading parameter.

- Following image shows all the above features.
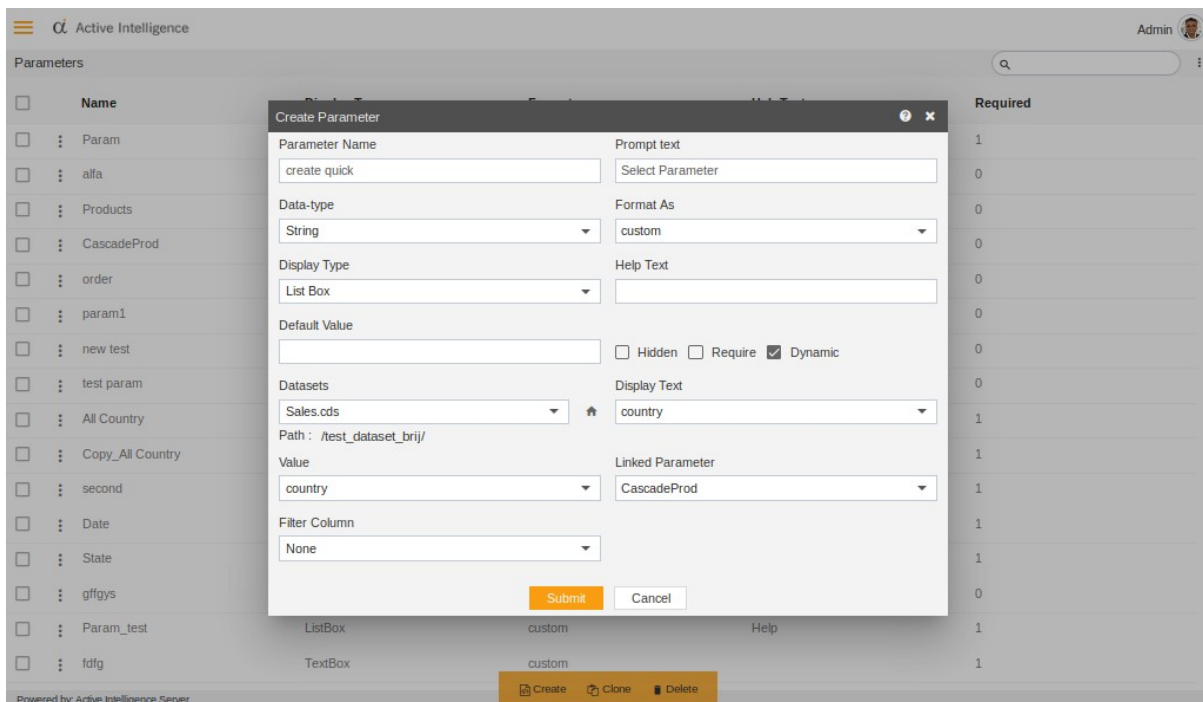
- Finally click on **Submit** button to create a new Parameter.

Edit Parameters

- Edit parameters edit the selected parameter.

- To Edit Parameter, follow these steps:
- To Edit Parameter select the desire Parameter from the list whilst in the Parameter section and right click and select ⌨ Edit Parameter from the context menu.

- The following dialog box will appear:
- Updated the value as required and click on ⬜Submit button to update the changes to the parameter.
-

Clone Parameters

- Clone enables user to make a new instance/copy of the selected file.

- There are multiple ways user can Clone Parameter.
- select any desired Parameter whilst in Parameter section and right click and select ⬜ Clone from the context menu or select ⬜Clone from the footer menu bar.
- To clone Parameter click on ⬜Clone button from the footer menu bar.
- The following dialog box will appear:
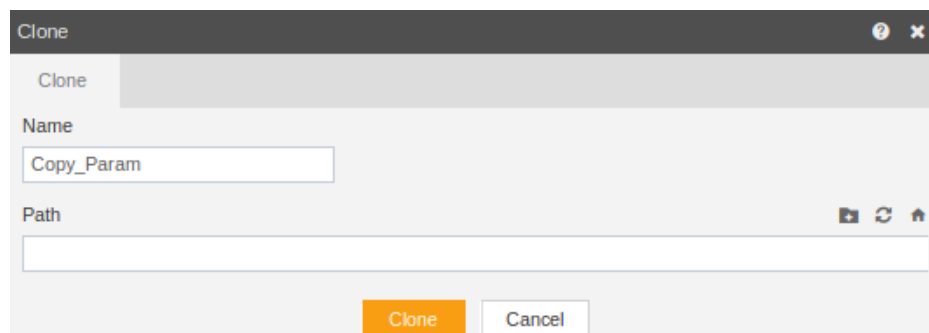
- The user has option to update the File Name and can refresh it, set the path and also can create new folder.
- Finally click on ⬜Clone button to finish creating a copy of selected Parameter.

Delete Parameters

- Delete Parameters delete the selected parameter.
- To Delete Parameter, follow these steps:
- There are multiple ways you can Delete Parameter.
- Select the desire Parameter and right click and select ⬜ Delete from the context menu or select ⬜Delete from the footer menu bar.
- Note: Multiple Parameter Delete is permitted.
- Select the Parameter you wish to delete and Click ⬜Delete button from the footer menu bar.
- The following dialog box will appear:
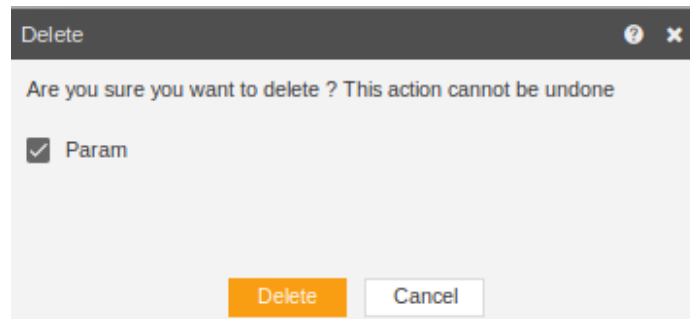
- Finally click ⬛Delete button to permanently delete a Parameter, alternatively you can press Cancel button to cancel the action.

Request

Request tab options can be used to see all notifications from system and users, schedule request/recurring request (reports), retry the request**.**

Also, it includes alerts and alert reports sub-sections where the user can create alerts of his choice and can be able to see the reports of alerts once the reports are scheduled.

Request tab has the following options:

Notifications

Notifications are the actions to notify a specific piece of information or the method in which notice is given to the particular user.
Notifications contain three different types:

Approvals

Approval Notifications shows the pending notifications shared with you to approve or reject.
Detail explanation for approval notification follow below steps:

Messages

Message Notifications shows the different message from ✉ Instant Message and 🚩 Dynamic Message.

Alerts

Alert Notifications shows the alert notifications such as 📢 Informative (Alerts).
- Click on 🔴 Alerts tab to see all Alerts available.
- The following image describes the alerts:

Requests

Request displays the status of any task which is scheduled as a Request. A user can schedule the request to execute the specific task or Re-Execute a particular task which would be added in Request and also can Retry, Cancel or Clone a particular request.

Once the request comes in the request section, it moves to either:
- Schedule,
- Waiting for the event,
- Running or
- Completed

All of the above tabs have common ID, Status, Start Date, End Date, Request Owner, Report Owner.

The report is scheduled when it comes to schedule tab.

The report goes to waiting for state when it does not get scheduled and falls into the waiting for event tab.

The report falls into the running tab when it is being running.
Report gets its state as failed or completed in the completed tab. Once it gets completed, it can be downloaded.

Request reports have other functionalities like :
- Cancel,
- Retry,
- Clone,
- Delete.

Cancel Request

Cancel Request allows you to cancel any currently running or scheduled request. A request cannot be cancelled if it has completed or failed its execution.

1. To cancel request a user should select a request (make sure Checkbox selected), an only single request can be cancelled at ones.

2. Click on ❌ Cancel button or right click on the selected request and Click Cancel to Cancel Request.

- Below is the image where request is selected.
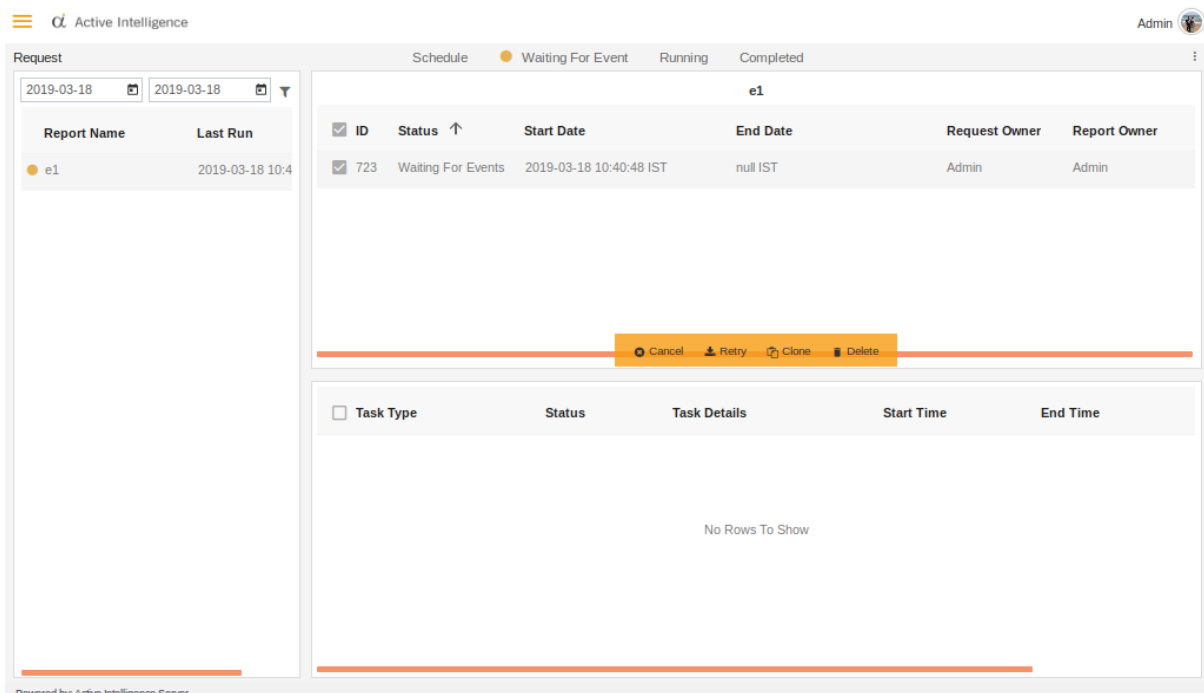
Retry Request

Retry Request is a way to re-run an existing request again.

1. To retry request you need to follow below steps:

- Select a request which you want to retry.
- As show in below image.

2. Click on retry button to retry a request (or right click on Status context menu will prompt to select).

- Retry dialog box will appear as below:

3. Select desired frequency and click on Run Jobs button to retry.
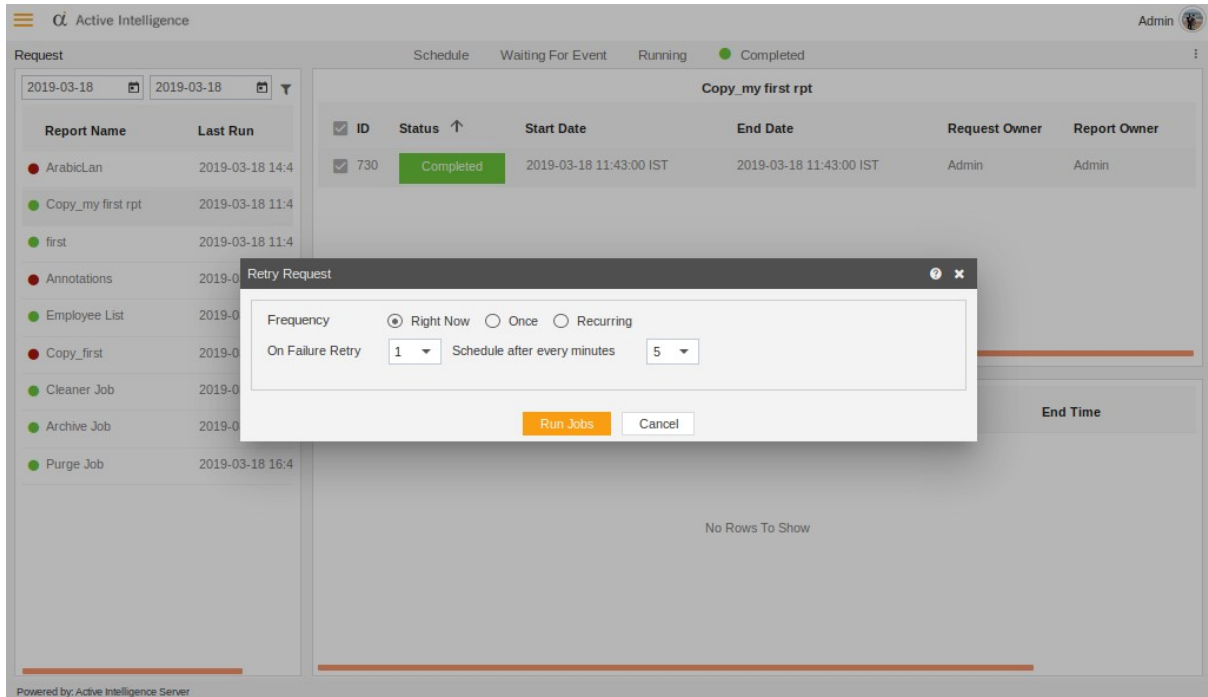
Clone request

Clone Request allows you to clone any particular Request.

1. To clone a request you need to follow below steps:

- Select a request which you want to clone.
- As show in below image.
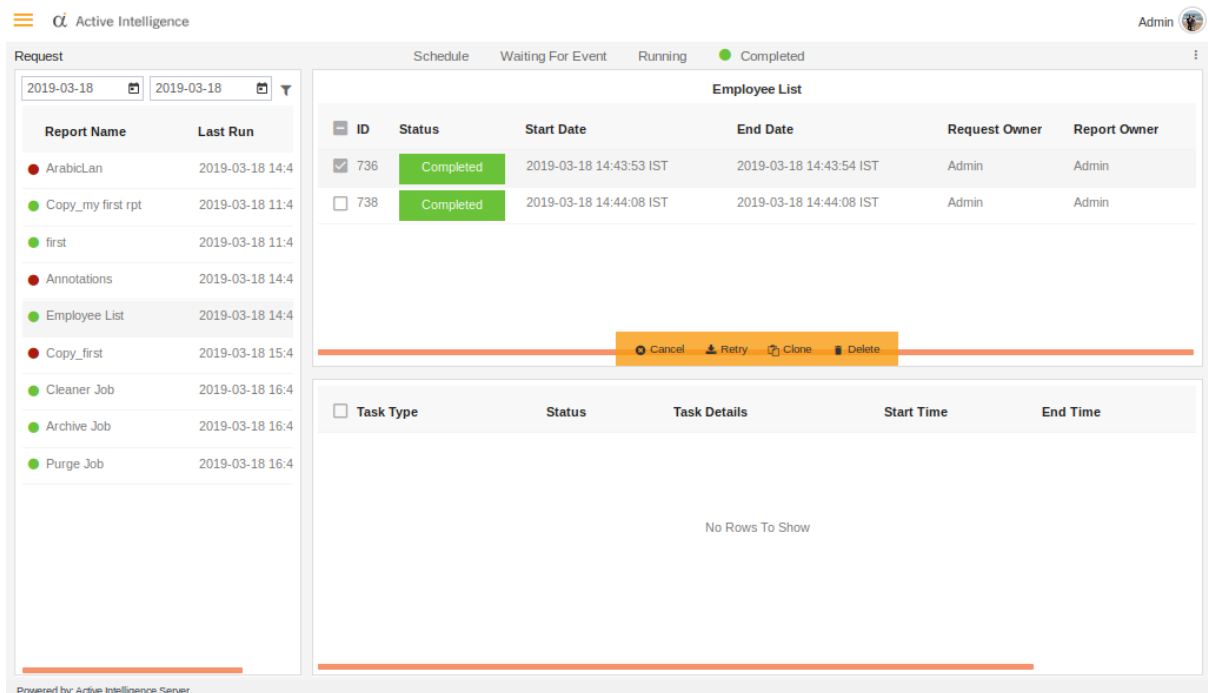
2. Click on button to clone a request (or right click on Status context menu will prompt to select).

- Schedule dialog box will appear as below:
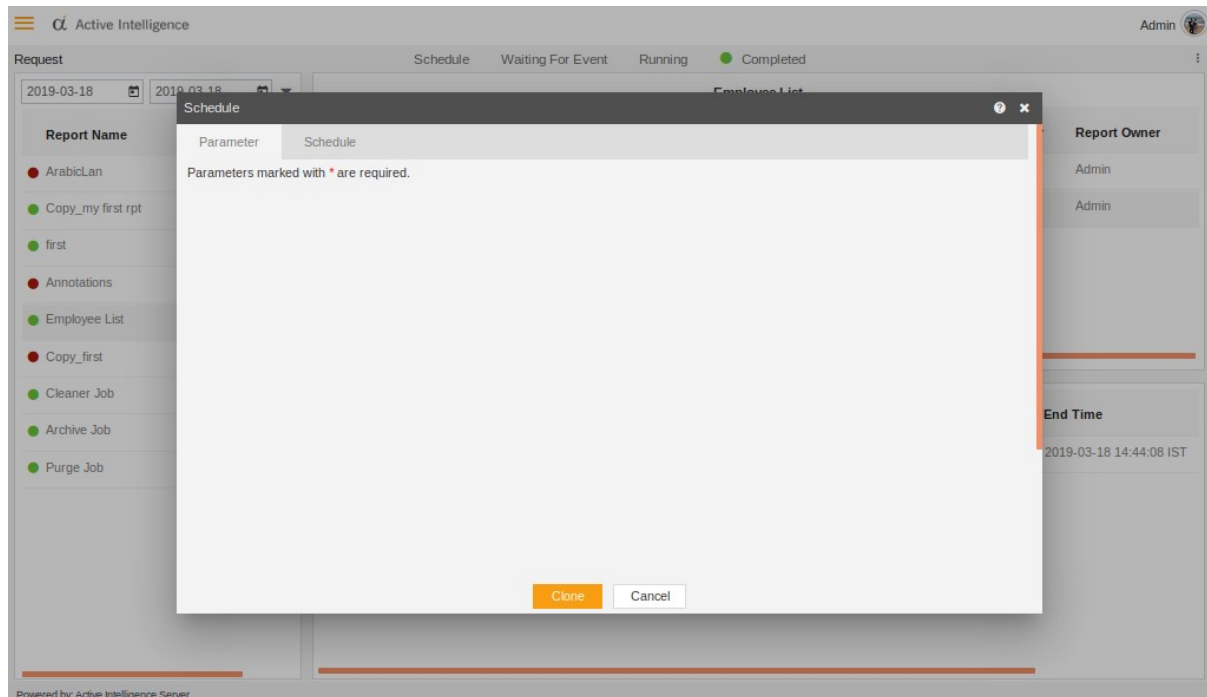
3. Fill the dialog as desired and click on Clone button to clone a request.

Delete Request

Delete Request allows you to delete any particular Request.

1. To delete request a user should select a request (make sure Checkbox selected), on only single request can be deleted at ones.

2. Click on button or right click on the selected request and Click Cancel to Cancel Request.

- Below is the image where the request is selected.
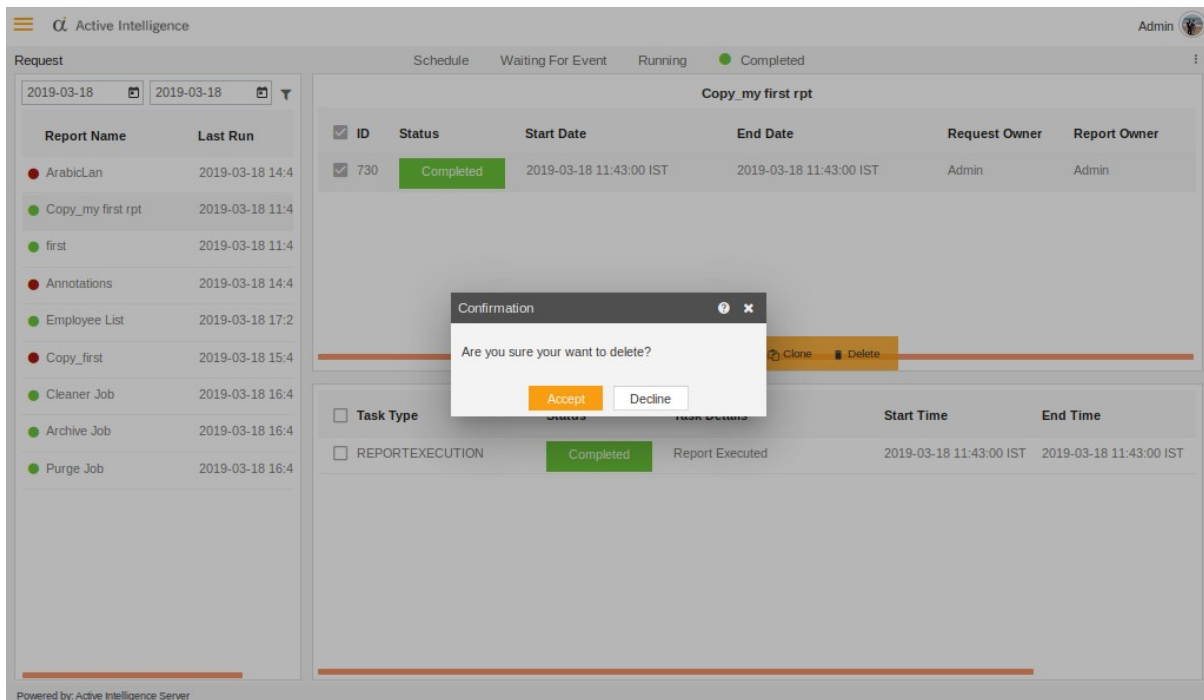
The Request has certain types such as:

- Archive
- Purge
- Cleaner Job
- Refresh
- Instant Message
- Select User

Alerts

Alerts section allows users to create alerts.

Alerts section has following functionalities :
- Upload
- Create
- Move
- Copy
- Delete
- Share
- Unarchive
- Unpurge

Create alert

1) The Users can create alerts either from bottom menu or from alerts context menu.

- Following is the image in which alert is created.
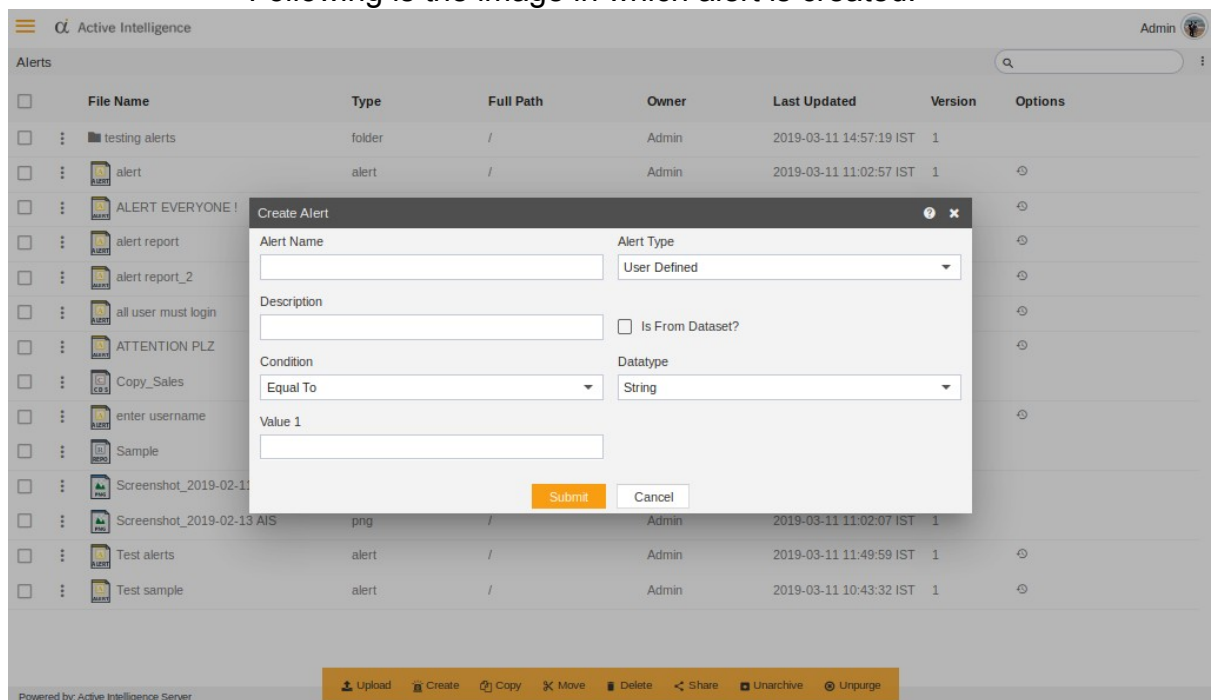
2) Click [Submit] button to create the alert.

Upload

1) Upload allows user to upload the desired files.

- Below is the image of file uploading.
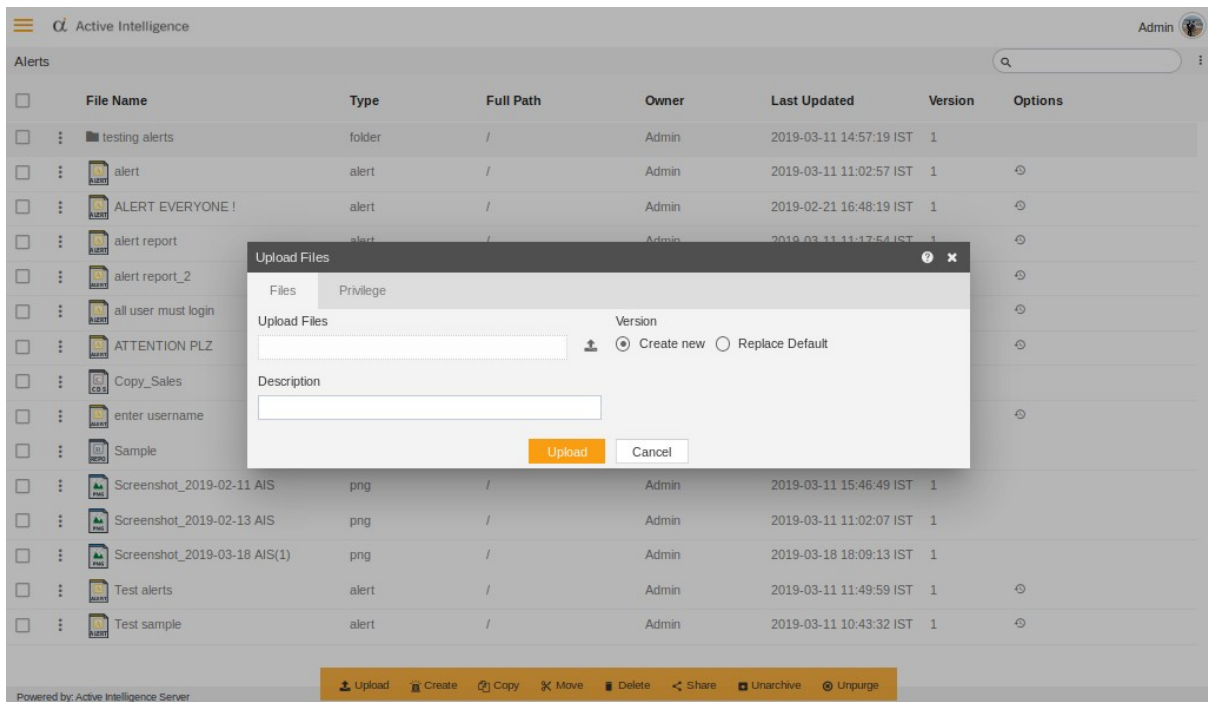
2) Click at **Upload** icon to upload the file.

Move

Alerts can be moved to the desired folder by clicking the move option from the bottom menu or else by right-clicking the context menu.

- Below is the image when user selects move option.
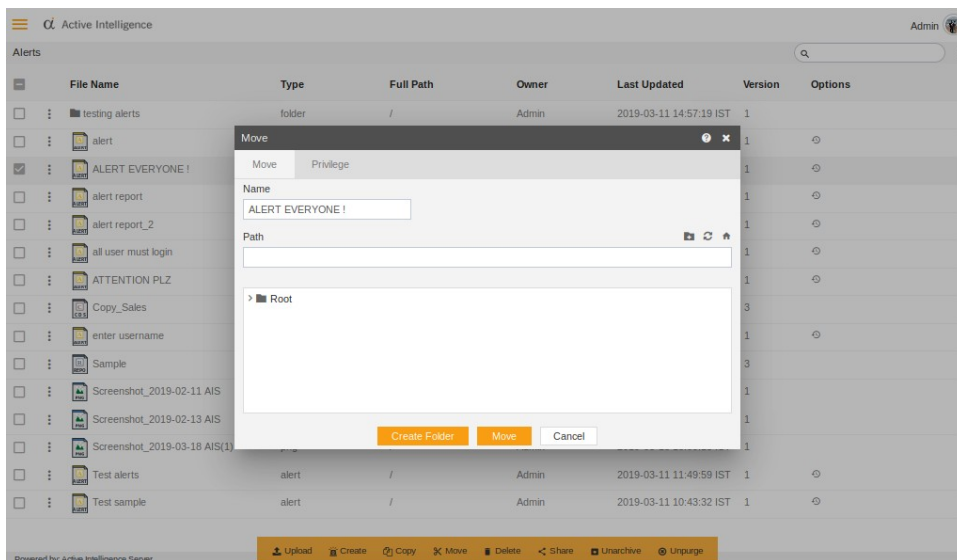
2) To copy at any new folder, create new folder by clicking [Create Folder] icon.

3) Click [Move] icon to move the alert.

Copy

1) A user can copy alerts by using the copy option from the bottom menu or from the context menu.

- Below is the image to copy any alert.
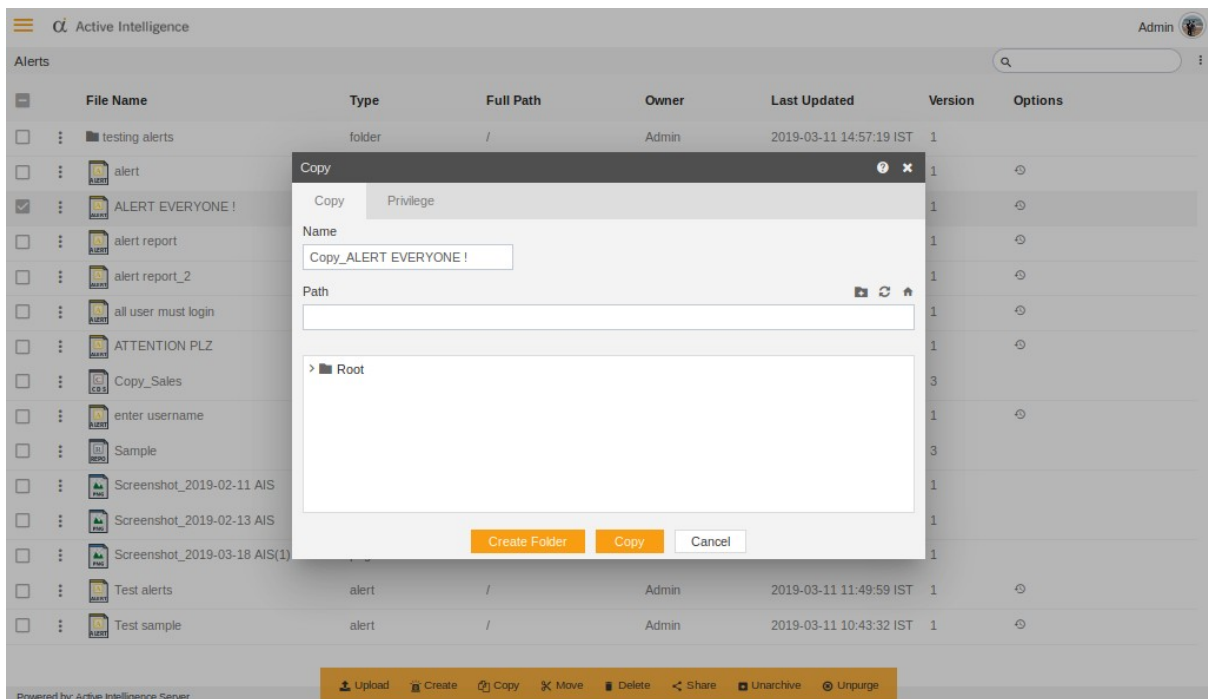
2) Click [Copy] icon to copy the alert.

Delete

1. Alerts can be deleted by clicking [Delete] icon from the bottom menu or from the context menu of alerts.

- Following is the image of how to delete the alert.
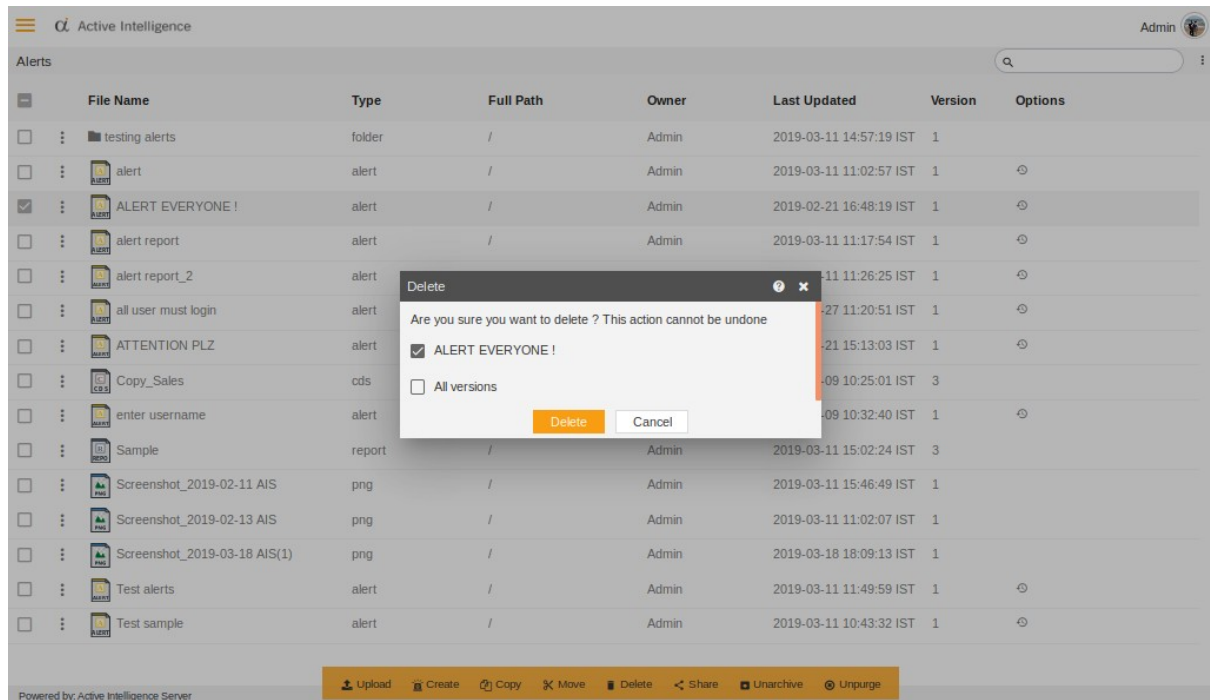
2) Click [Delete] button to delete the selected alert or multiple alerts.

Share

Share is used to share any alert with other users.

1. The user can share alerts by clicking [Share] icon from the bottom menu or from context menu of alerts.
   - Below is the image of how to share an alert with other users.
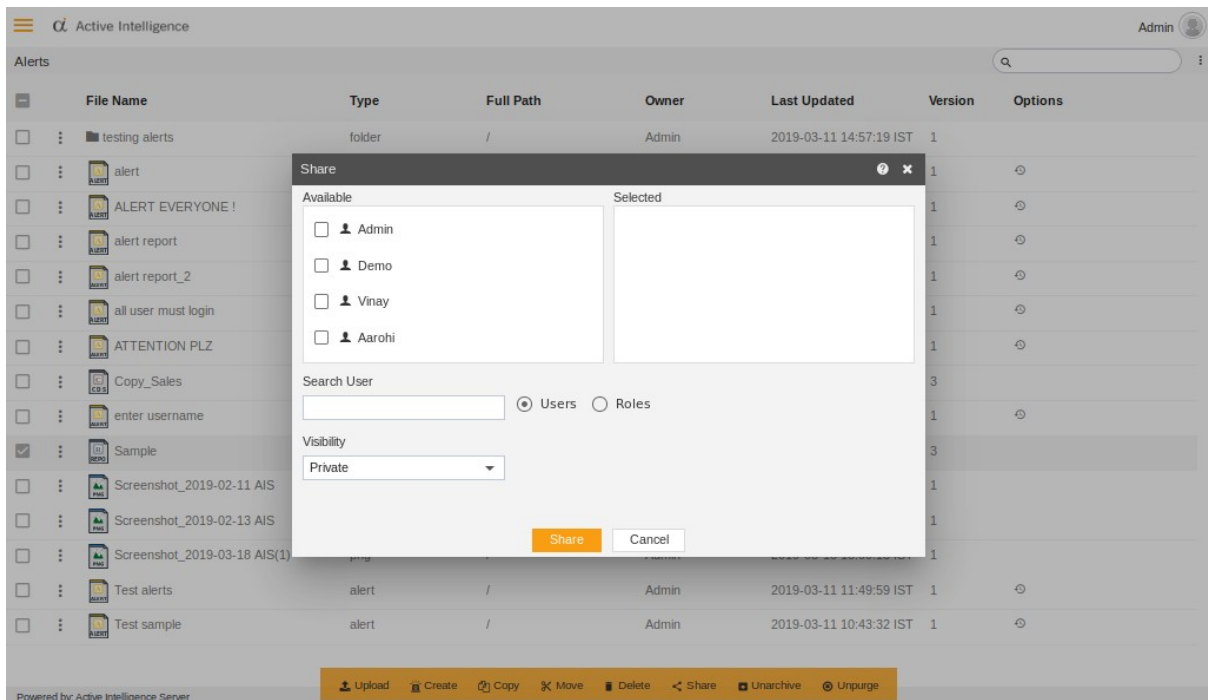
2) Select the user with whom you want to share an alert.

- Below image shows how to select the other user to share the selected alert.
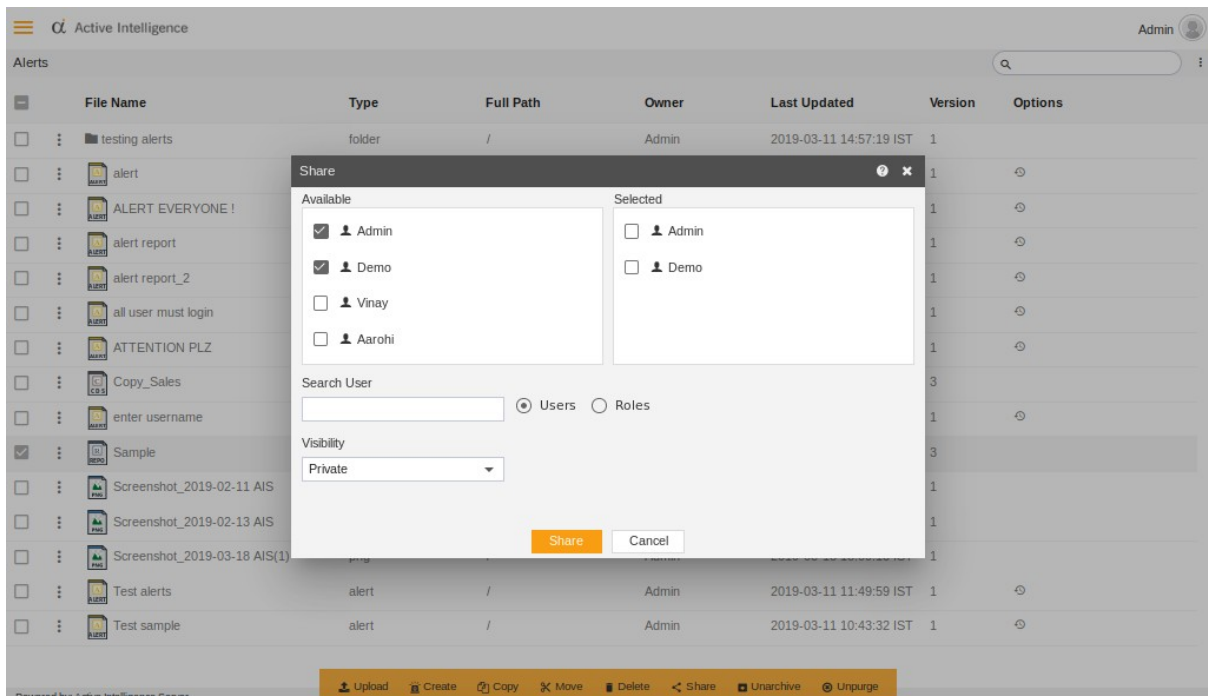
3) Search the user from textbox.

4) User can change the visibility to private, Internal or Public mode by clicking these options.
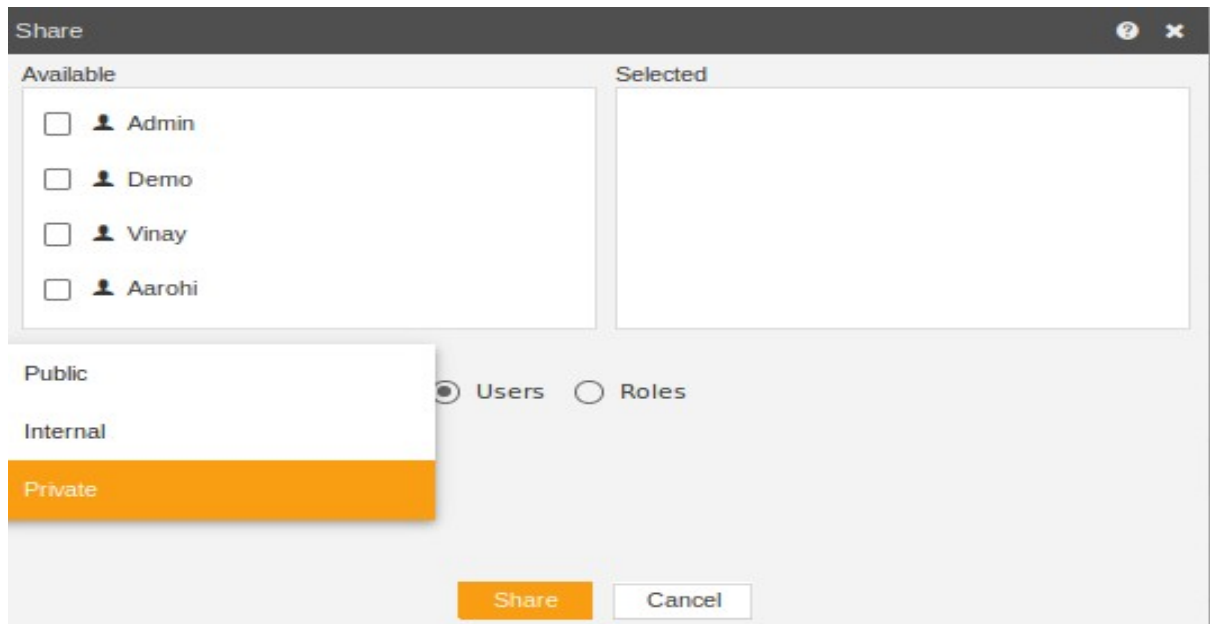
5) Click [Share] button to share the alert.

Unarchive

To Unarchive file and folders follow these steps:

1. Select the file or folders you want to Mark as Unarchive.
   (Note: multiple file and folders or combination of file and folders can be selected).

2. Right-click and select the ▣ Mark As Unarchive o button from the context menu or directly from the bottom menu as shown in the image below:
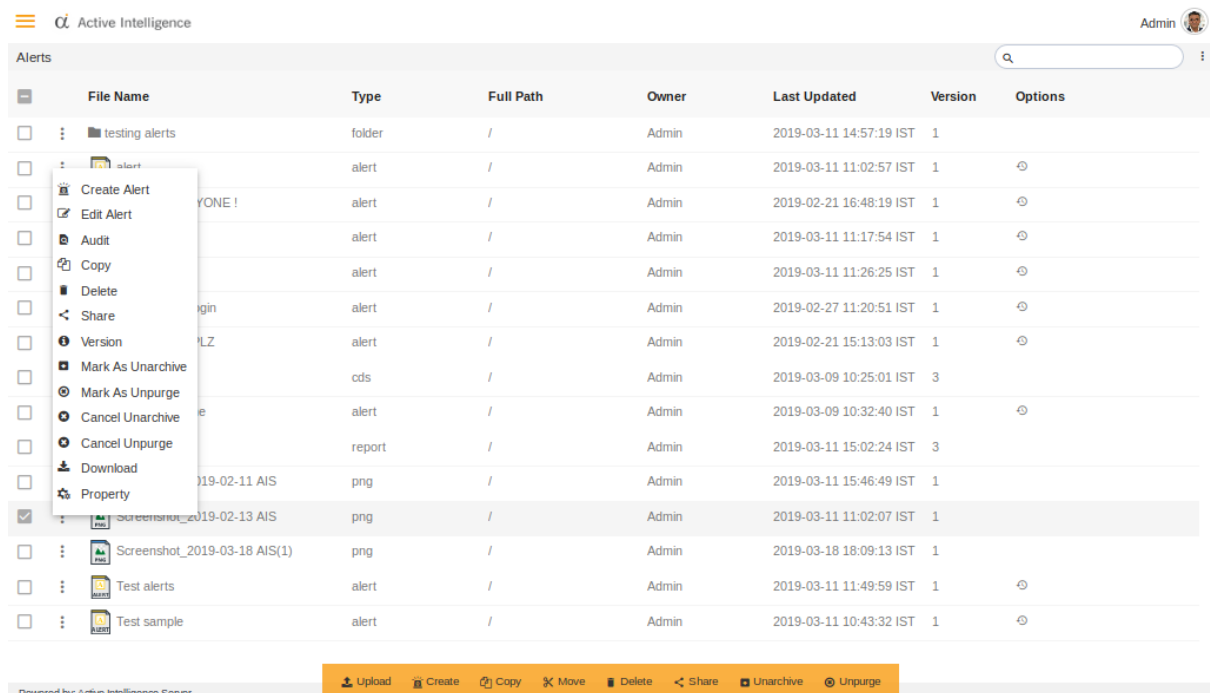
Unpurge

To Unarchive file and folders follow these steps:

1. Select the file or folders you want to Mark as Unpurge
   (Note: multiple file and folders or combination of file and folders can be selected).

2. Right click and select the ⊛ Mark As Unpurge button from the context menu or directly from the bottom menu as shown in the image below:

Download

The User can download the selected alert by clicking download option from context menu.

Version

Version option shows the number of versions of the selected alert as well as the version which user is using.

- Following is the image describing number of versions of selected alert.
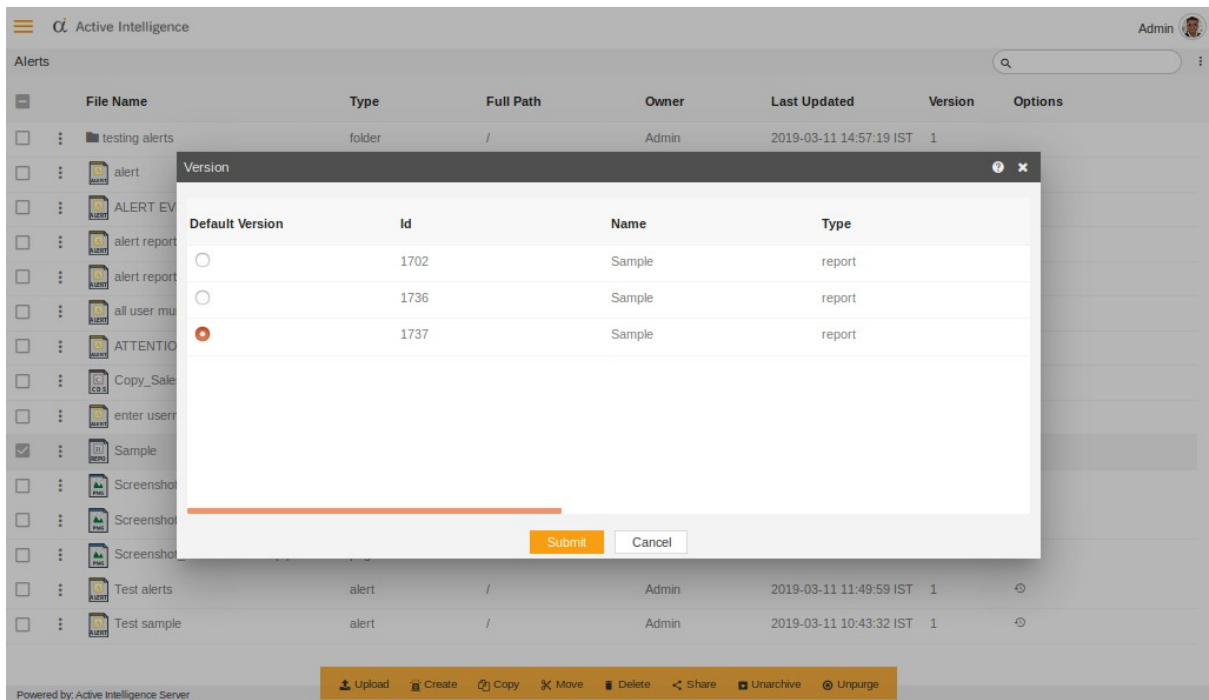
Audit

Audit shows the actions like when the user created, uploaded or downloaded any particular file.

- Following image describes the audit option.
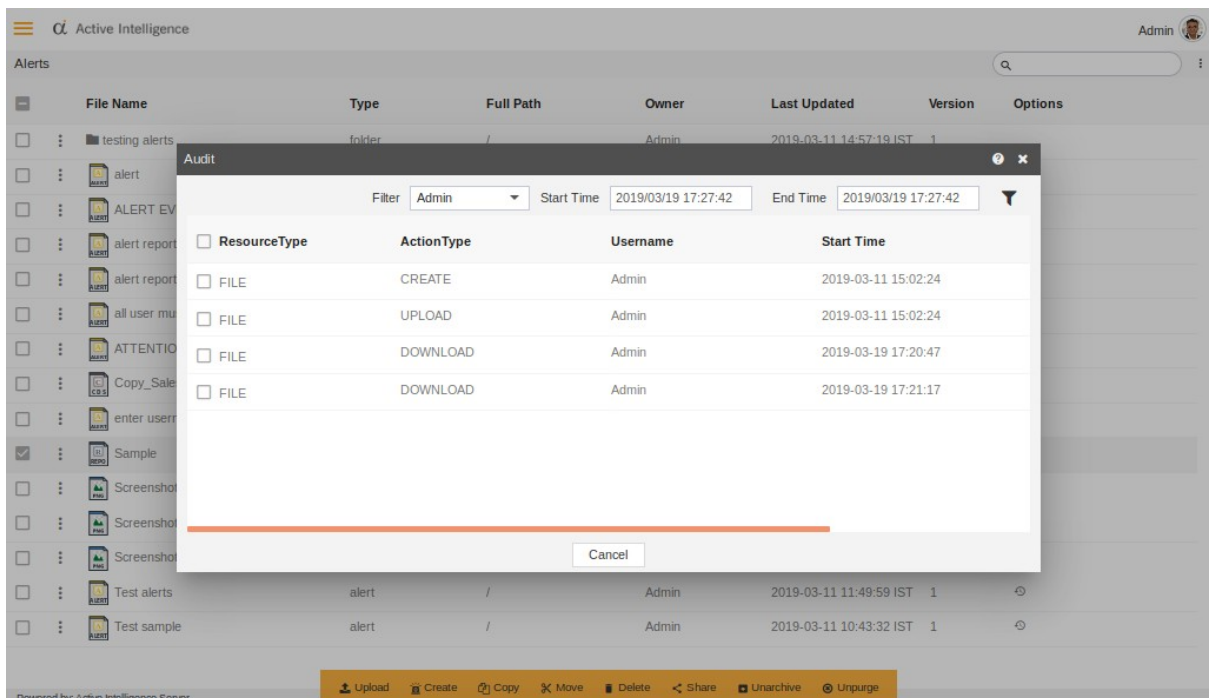
Cancel Unarchive

To Cancel Unarchive file and folders follow these steps:

1. Select the file or folders you want to Cancel Unarchive.
   (Note: multiple file and folders or combination of file and folders can be selected).
2. Right click and select the ⊗ Cancel Unarchive button from the context menu as shown in the image below:
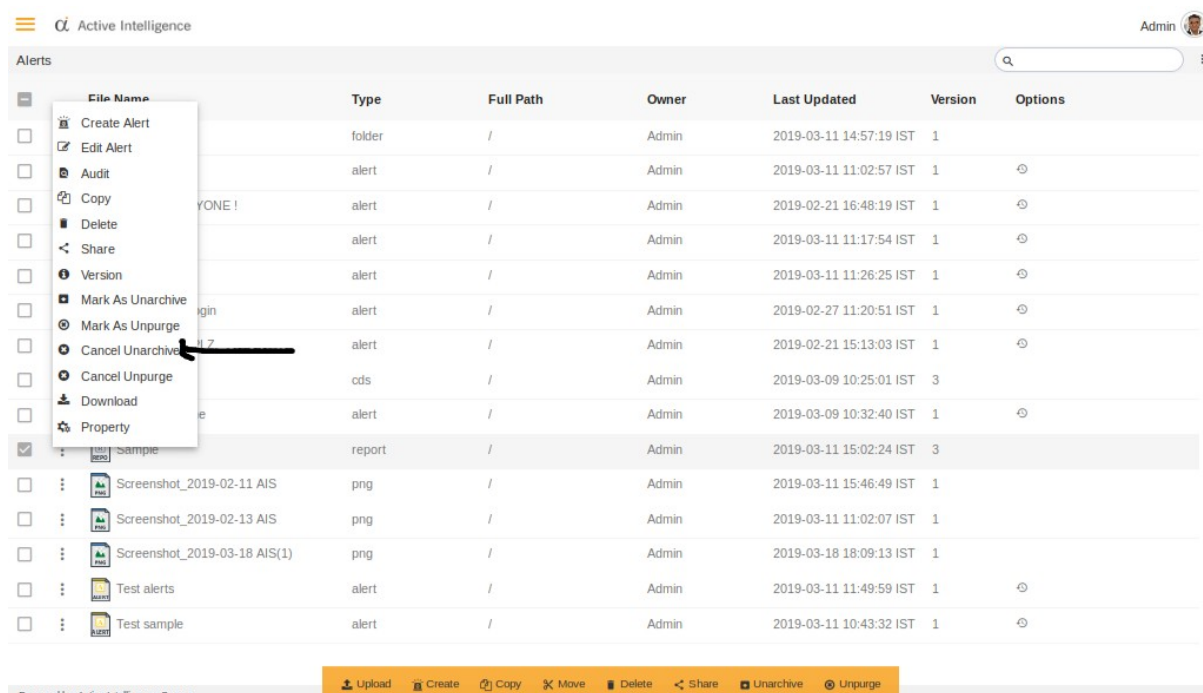
Cancel Unpurged

To Cancel Unarchive or Unpurge file and folders follow these steps:
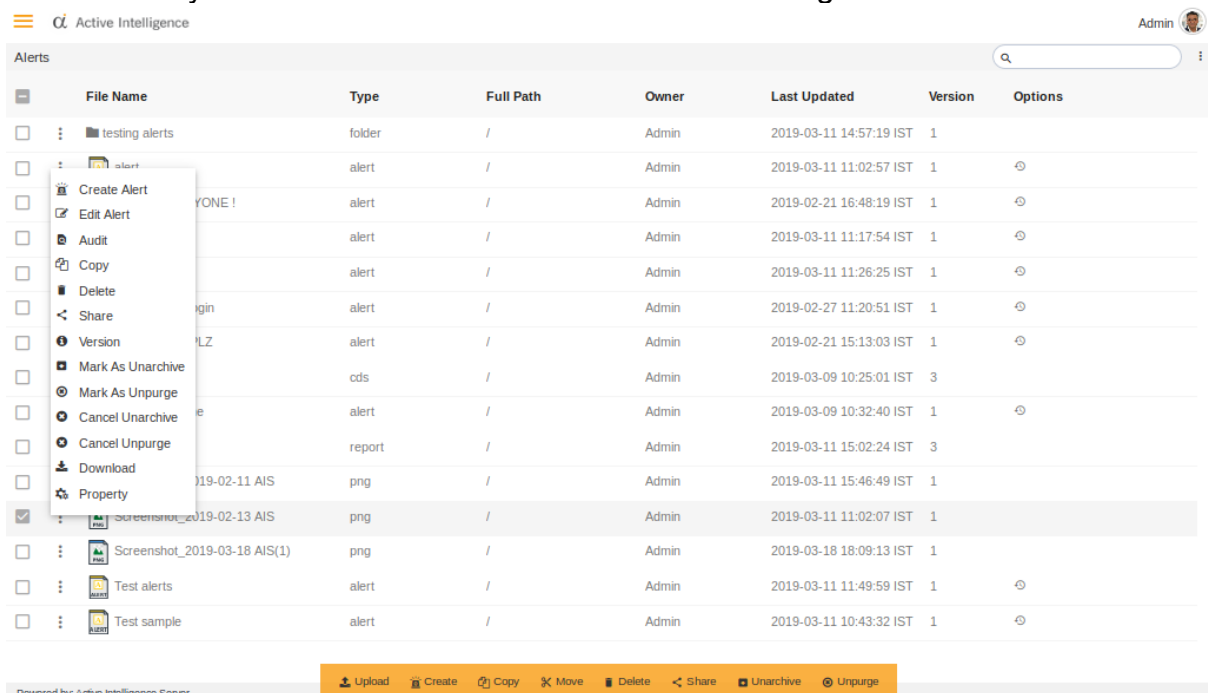1. Select the file or folders you want to Cancel Unpurge.
   (Note: multiple file and folders or combination of file and folders can be selected).
2. Right-click and select the ⊗ Cancel Unpurge button from the context menu as shown in the image below:

Property

Use Properties option of the file and folders for the following:

- To update the Name of the file and folders
- To change the Output Types of the File (Note: only applicable to files)
- To view file and folders Properties such as owner information, last updated by, the file created date, archive and purge options, and file visibility i.e. (Private, Internal, Public) and much more.

To view the Property for the file or folder follow the steps below:

1. Select file or folder you wish to see properties for or update the information such as Name or Output Type by selecting ⚙ Properties from the context menu, following dialog box will appear as shown in the image below:

2) The Name can be updated (Note: The above image is taken from the Folder Properties,File Properties will have additional tab for Output Type which will enable users to select/unselect the file Output visibility Type i.e pdf, doc, html etc.).

3) Finally click [Submit] button to save the changes to the file Properties, if any.

Alert Reports

Alert reports shows the details of alerts in report form.

- It has name of the alert, status, Date executed, Executed By, Actual value, Condition, Value one, Value two.

- Below image shows the alert reports.

Administration

After login into AIV , you can navigate to administration section from the ☰ α Active Intelligence menu.

Administrators can use this section to manage repository, users, roles, and file type in the server.

Administration tab has following options:

Repository

The Repository can be used to manage various artifacts (including analytic, approval, dashboard, datasets, data source, list of values, mapping, merge, parameters, quick run, reports, resources, widget) created by users. The Repository contains all the artifacts created by users.

Following are the steps to use Repository:

1. Click Administration from the top menu -> Click Repository.

2. This will redirect the user to Repository section which will have further two drop down menu on the right hand top corner which are User and Category.

3. Select the desired User and Category which will then provide the detail list of the selected user artifacts as shown below:
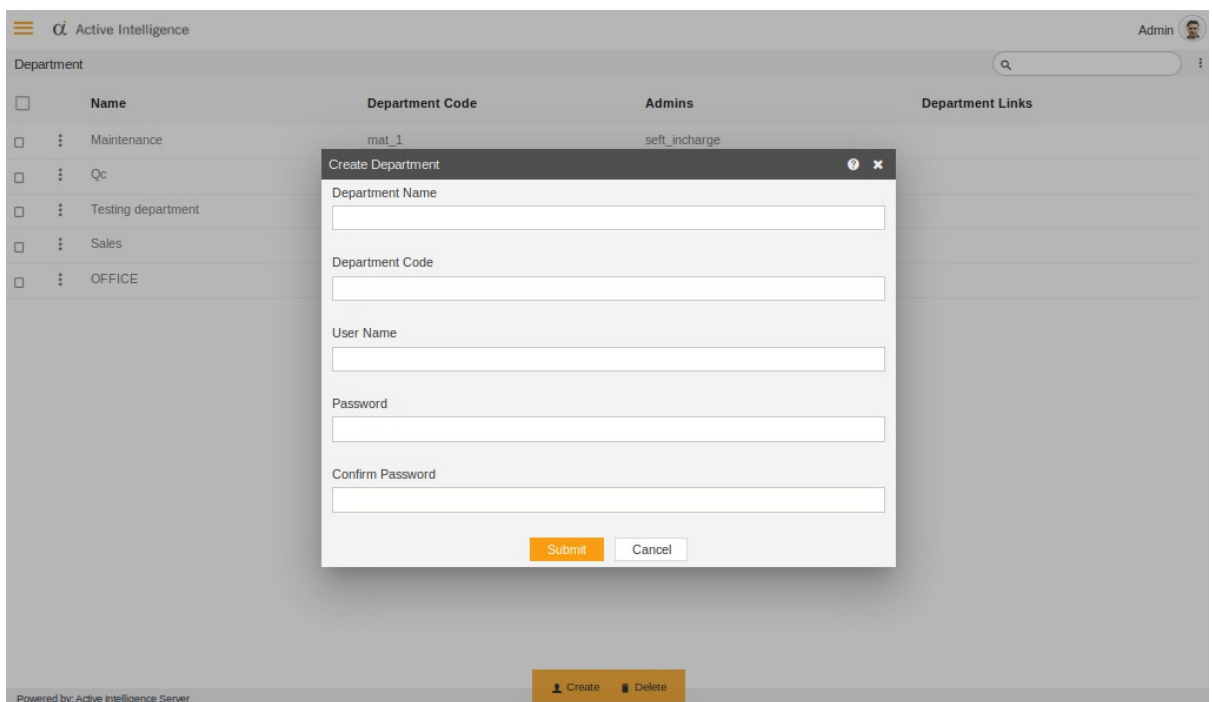
Department

Department is used to create an individual user to identify each department besides the default.

Create Department

Create the department from the bottom 'create' option or from the rightmost icon. Then enter the values. Go to submit and thus your department is created.

You can check this in users where admin and department code can be observed.

Delete Department

Same way if you want to delete then click 'delete' option from the bottom or select 'delete' from the elapses.
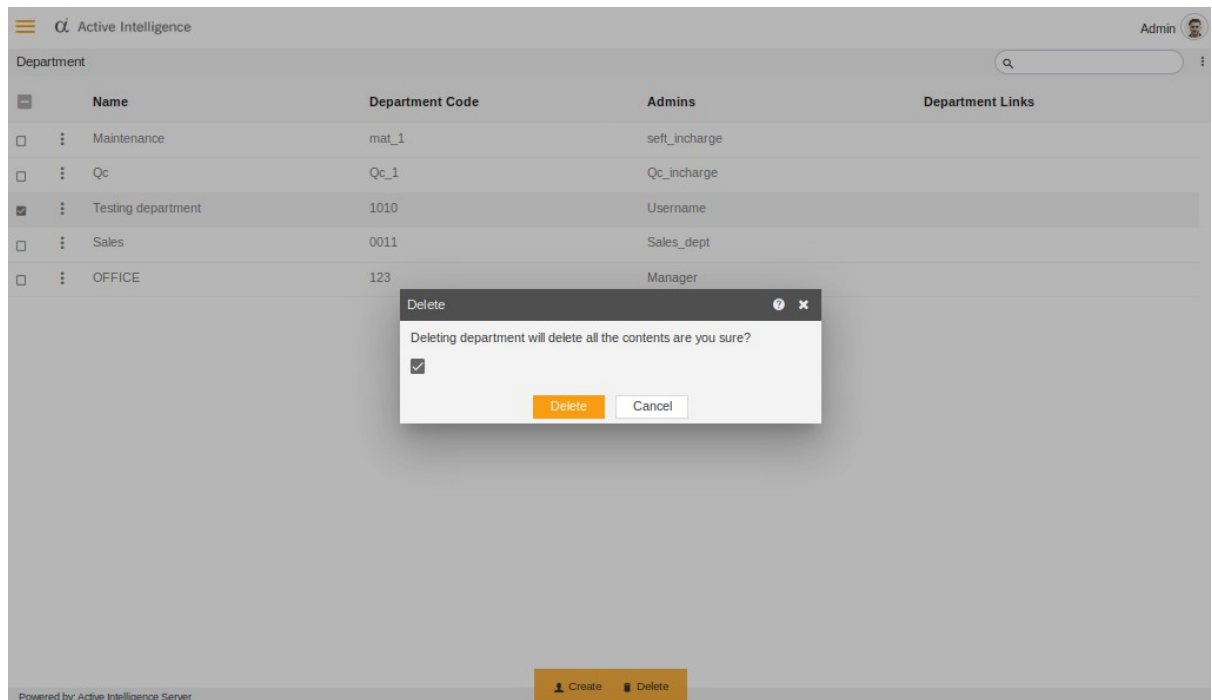
Users

Only users with Administrator privileges have access to Users section (Users information can be seen by clicking Users under Administration tab from the main menu bar), using Users option Administrator can:

Create User

To Create a user, follow these steps: (Only users with Administrator privileges have access to Users section). There are multiple ways you can Create a User (select any User Name whilst in Users section and right click and select from the context menu, select create from the footer menu bar. Click 'create' from the bottom menu. At last click, the 'Submit' button and the user will be created.

The following dialog box will appear:

Edit User:

To Edit user, follow these steps: (Only users with Administrator privileges have access to Users section).

To Edit User select the desired Username and right click and select edit user from the context menu.

An administrator can Edit the User properties

(Note: Username cannot be changed).

Finally, click on Submit to save the changes to the User.

The following dialog box will appear:

Assign Role:

To Assign Role to a user, follow these steps: (Only users with Administrator privileges have access to Users section)

There are multiple ways you can Assign Role to a User (Select the desired Username and right click and select assign role from the context menu and from the footer menu bar. (Note: Roles can be Assign to one user at a time)

Click assign role button from the footer menu bar. At last click 'Submit'.

The following dialog box will appear:

Delete

To Delete a User, follow these steps:(Only users with Administrator privileges have access to Users section)

There are multiple ways you can Delete a User (select the desired Username and right click and select delete from the context menu or from the footer menu bar (Note: Administrator can only Delete one user at a time)

Select the User you wish to delete and Click the 'Delete' button from the footer bar. The following dialog box will appear:

Roles
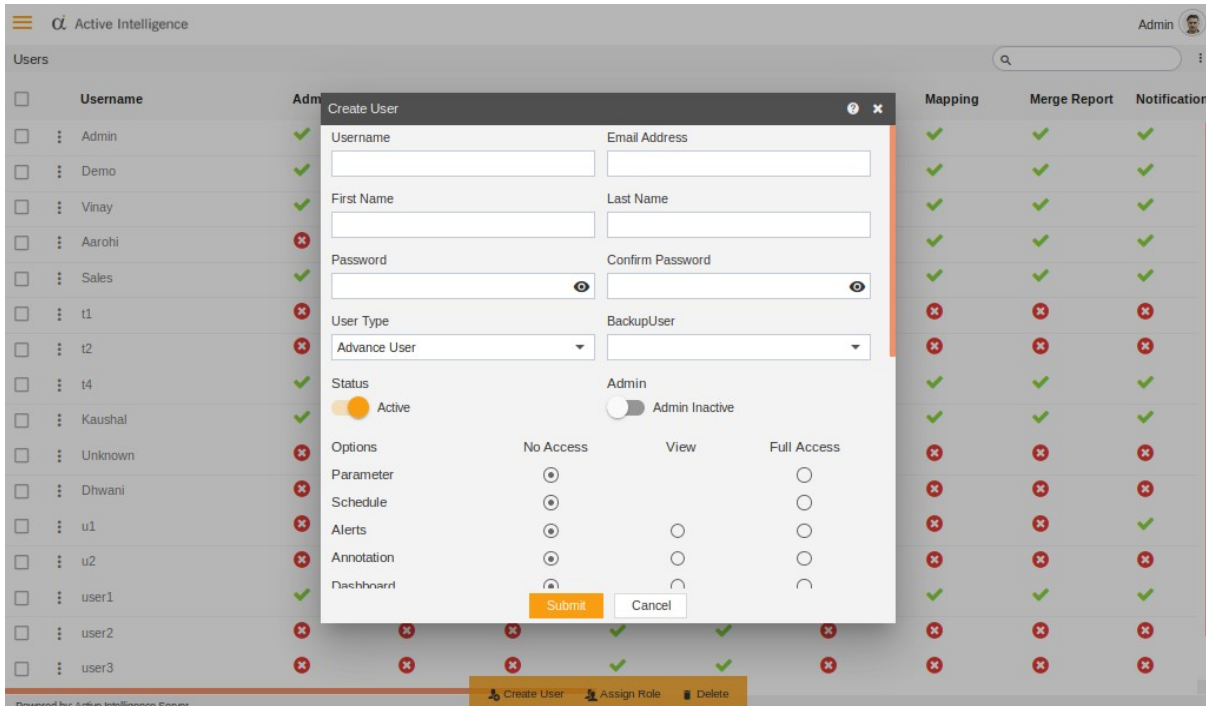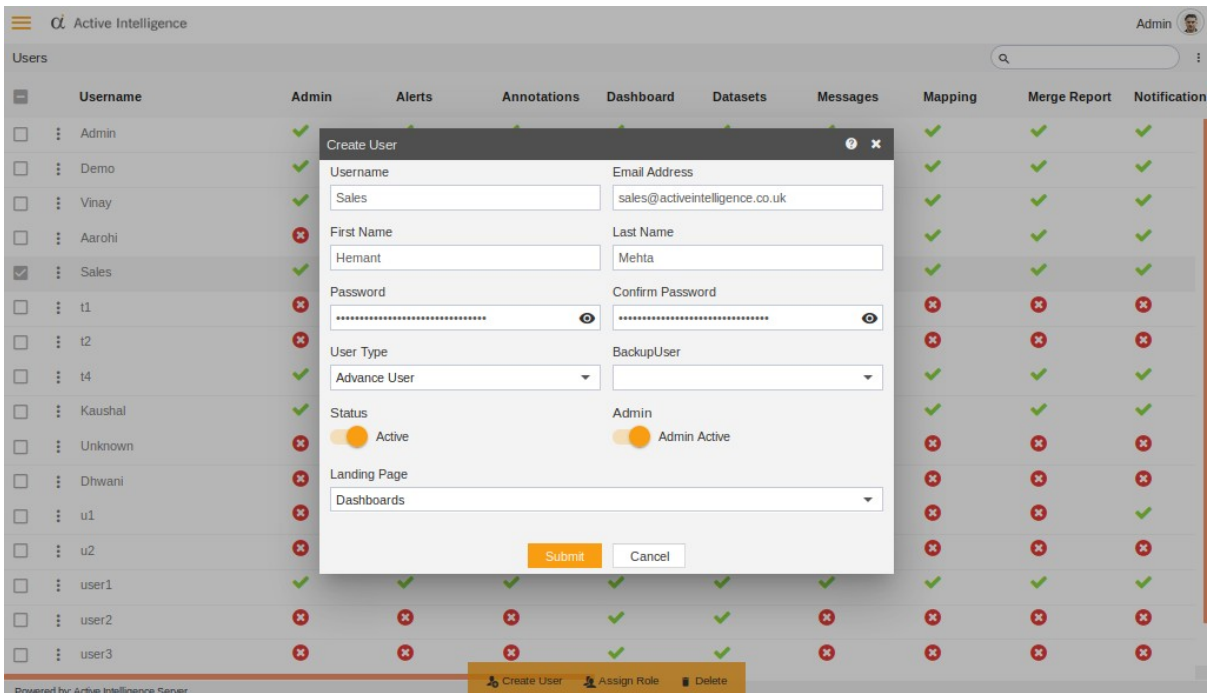
Only users with Administrator privileges have access to Roles section (Roles information can be seen by clicking Roles under Administration tab from the main menu bar), using Roles option Administrator can:
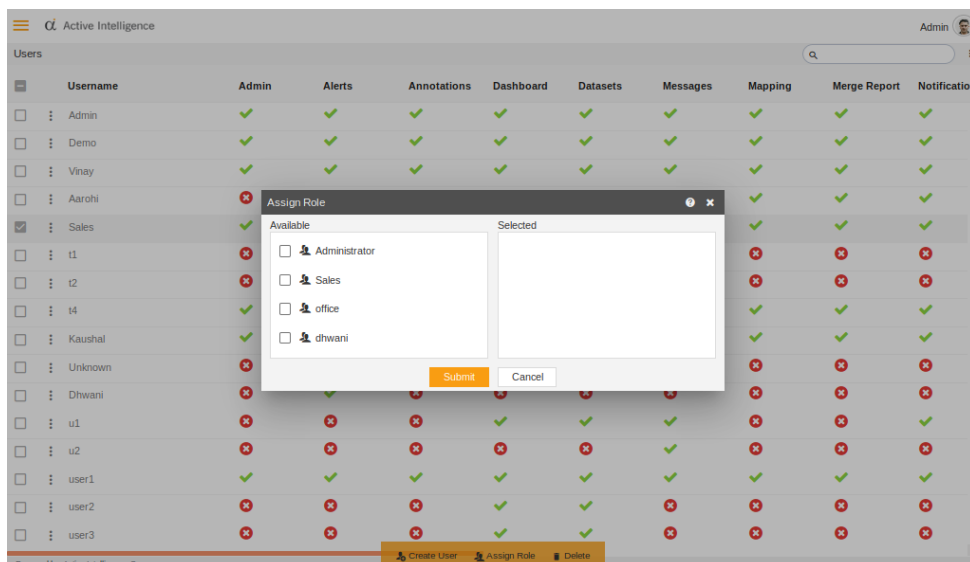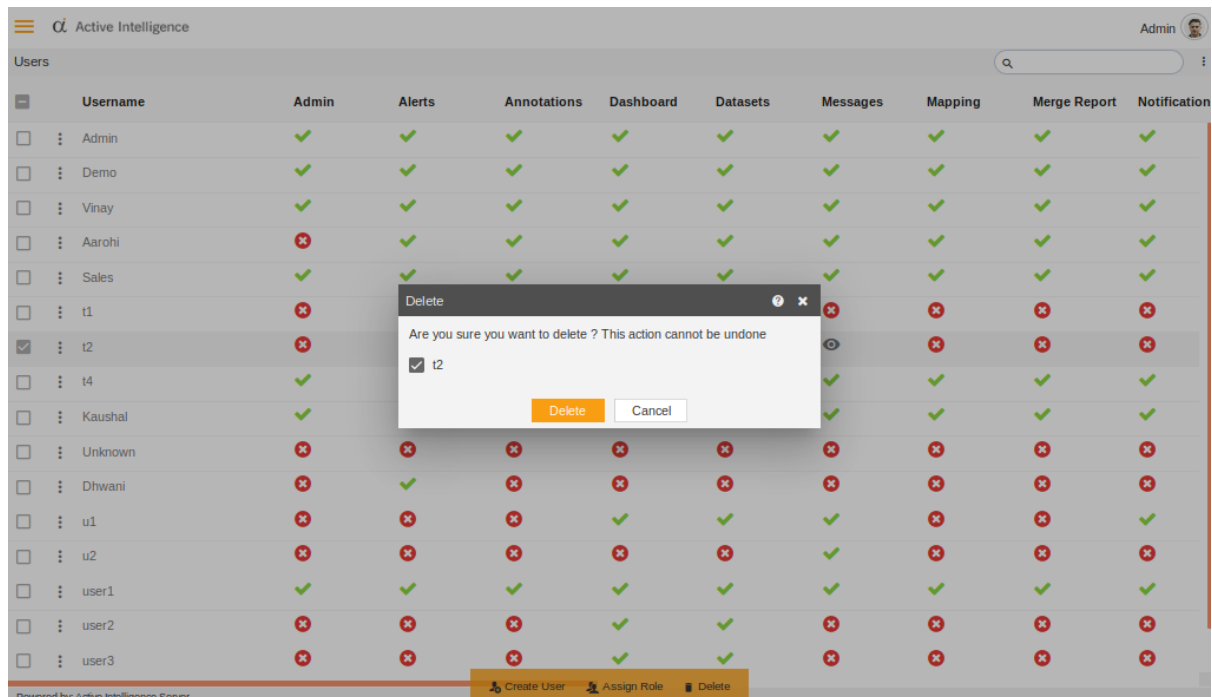
Create Role

To Create a Role, follow these steps: (Only users with Administrator privileges have access to Roles section)

There are multiple ways you can Create a Role select any Roles in Role section and right click and select Create Role from the context menu, select Create from the footer menu bar.

Click Create button from the footer menu bar.
The following dialog box will appear:
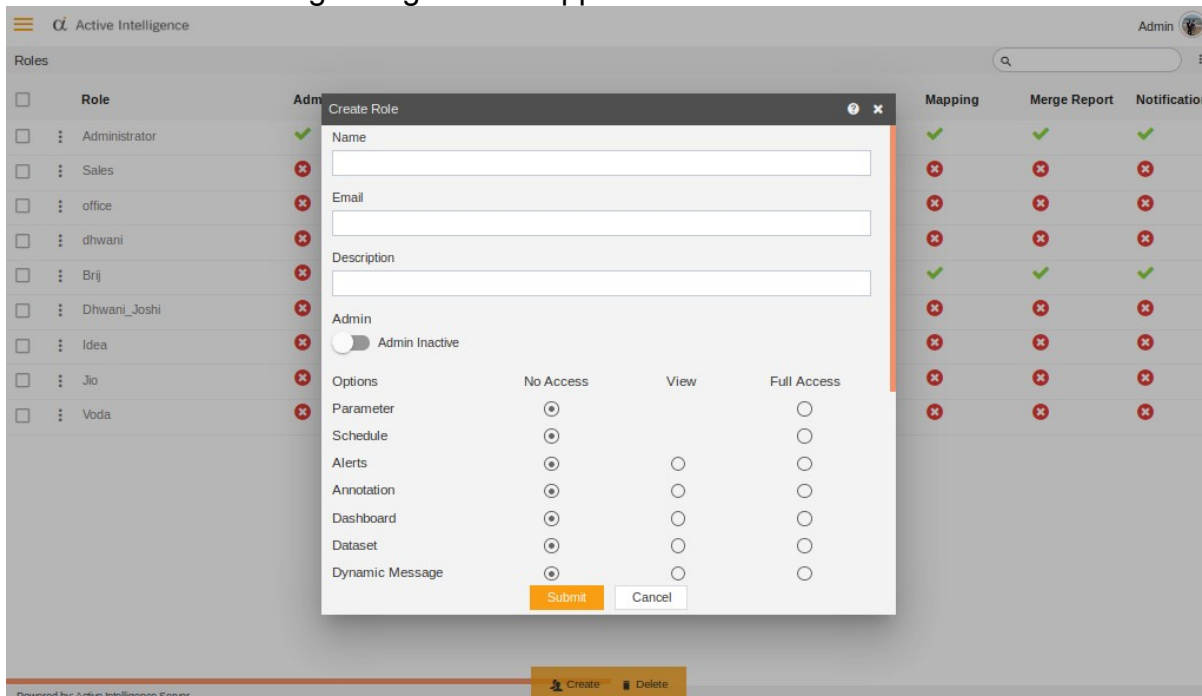
To create Admin Role, simply active Admin by moving the slider to the right, the bar will turn Green and all the other options will get disabled. (This will give role Admin privileges)

When Role is not part of Admin Role, Administrator can assign different privilege to the Role depending on the Role they are creating, this can be done using the various options, there are three Options available for each sections i.e. No Access (Users with this Role will have no access to the selected sections) View (Users with this Role will have only view privileges, that means they cannot edit or create new files in the selected sections) Full Access (Users with this Role will have all the rights such as create, edit, upload and delete the files for the sections with Full Access)

Click 'Submit' to create a new Role.

Edit Role

To Edit Role, follow these steps:
To Edit Role, select the desired Role and right click and select from the context menu.
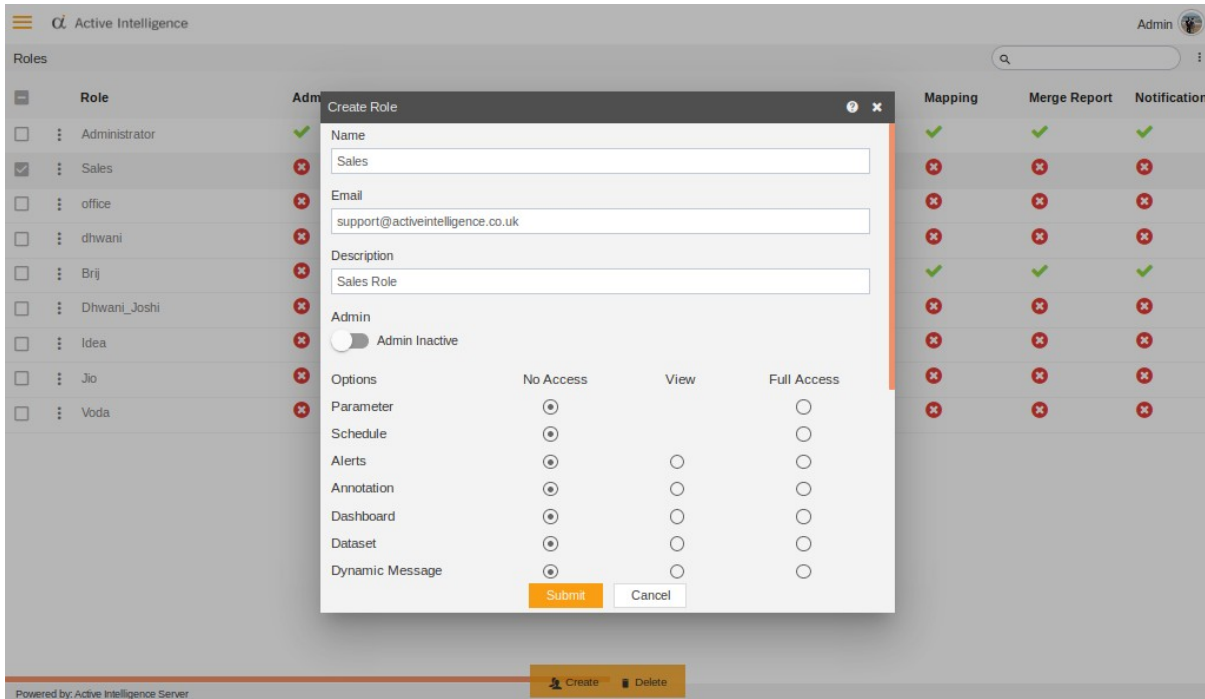
Delete

To Delete a Role, follow these steps:
There are multiple ways you can Delete a Role: -select the desired Role and right click and select delete from the context menu or from the footer menu bar.

File Types

Using File Types option Administrator can create a file in different formats such as docx, jasper, json, rptdocument, xls, etc. An administrator can define their own custom file type as well. File Types have the following functions:
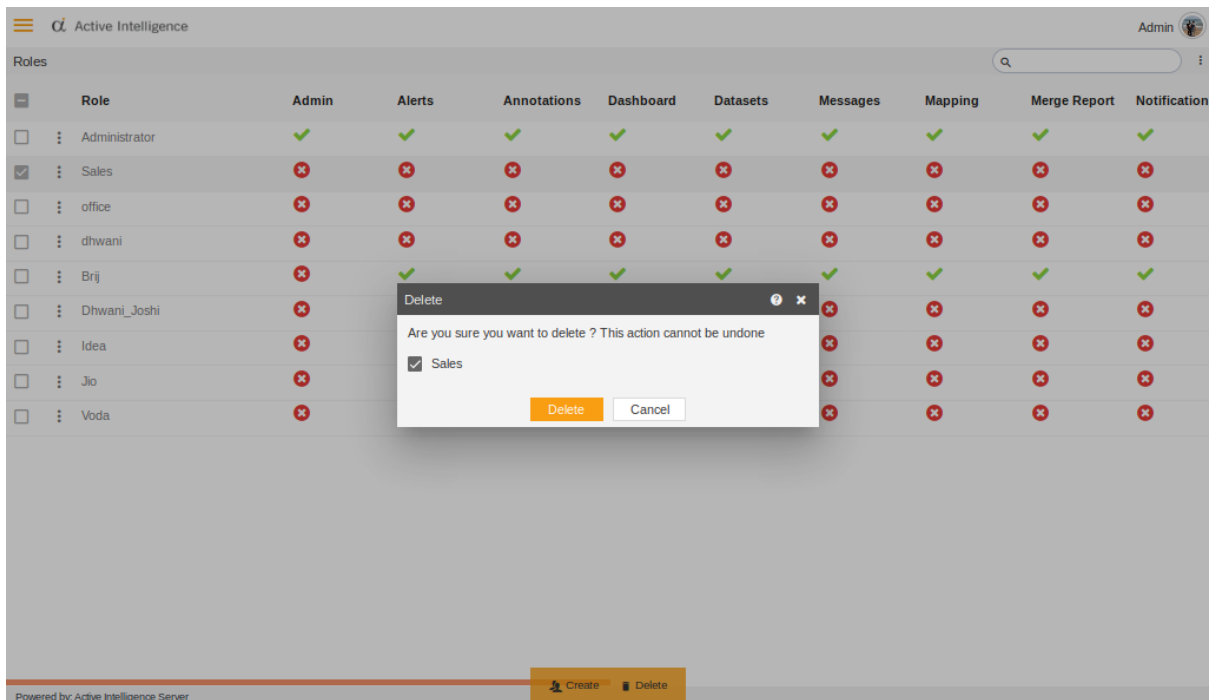
Create File Type

To Create a File Type, follow these steps:

Select any available File Types in File Types section and right click and select create file type from the context menu, select 'Create' from the footer menu bar.

If the File Type you are creating is Output Type itself then check the box which says Is OutputType else select the existing File Type from the Available list.

Enter the values and hit the submit button. Your file type is ready.
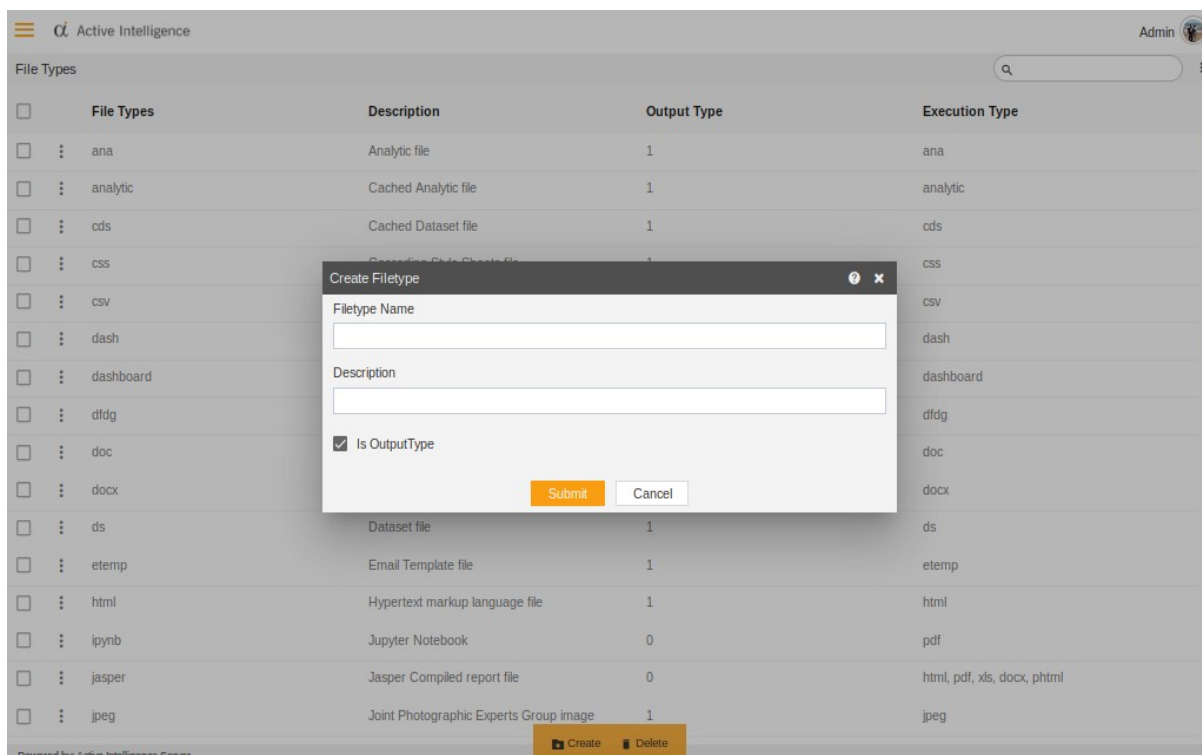
Edit File Type

To Edit File Type, select the desired File Type whilst in File Types section, right click and select edit file type from the context menu.
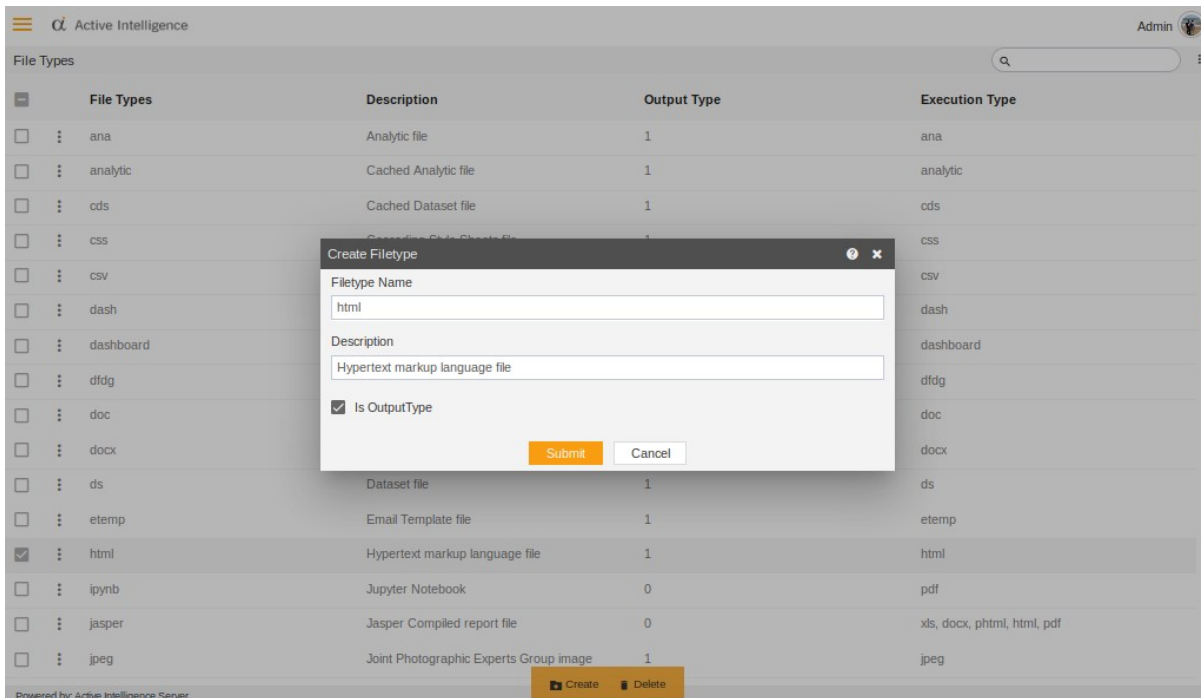
Delete File

To Delete a File Type, follow these steps:
Select the desire File Type and right click and select DELETE from the context menu or click DELETE from the footer menu bar.

License

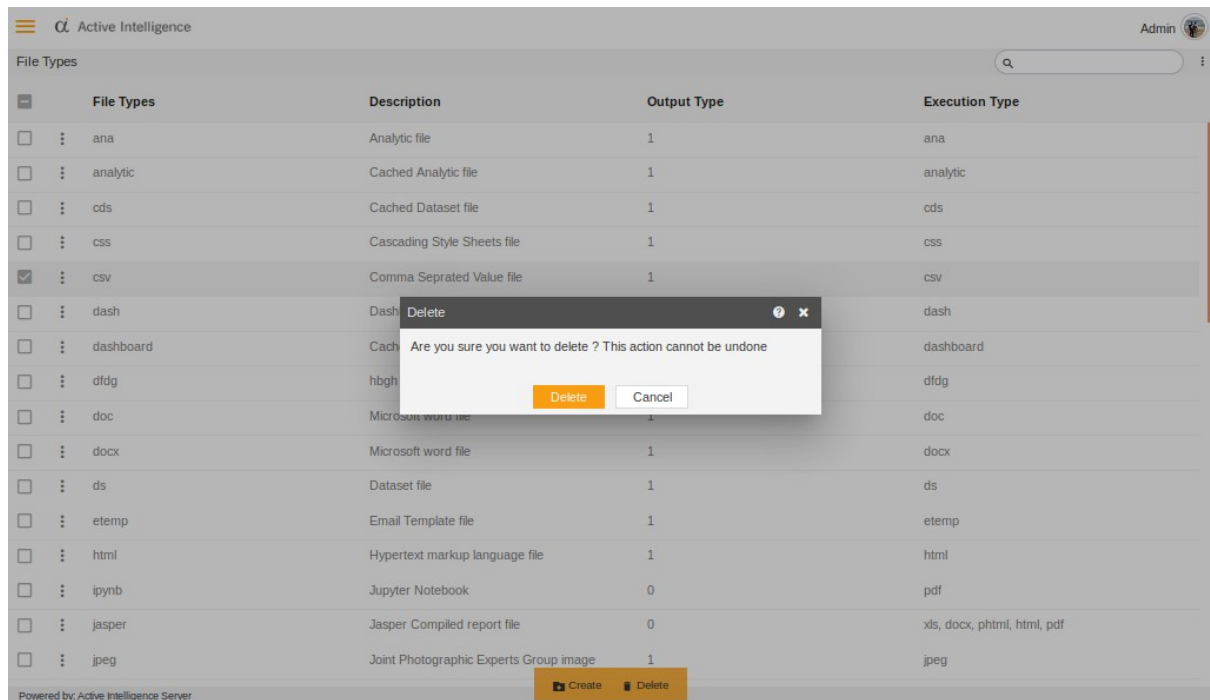License information can be seen by clicking License under Administration tab from the main menu bar.
Only users with Administrator privileges have access to License information

 using License option you can:

- View the detailed License Information such as supported report designers version, license type, license expiry date and much more (as shown in the image below)
- Update the License or,
- Request a new License.

Control Panel

Control Panel enables user-specific customization such as Language settings i.e. Dutch, Arabic, French, Chinese, etc. set the Time zone, enable the Backup User and much more.

To access Control Panel click on the drop-down menu next to the user name 👤 Admin ▾ at top right corner and select ⚙ Control Panel

Control Panel enables the users to customize/update the below preferences:

Default Dashboard - Enable user to choose their Default Dashboard from the list of available dashboards.

Landing Page - Landing page can be user specific, which means each time when a user logs in to AIV the section set as a Landing Page Will be displayed as a first page.

Locale (Language) - User can set any Locale (Language) from the list of available Locale (Languages), this will enable a user to see all the menu items in their native/set language.
Time zone - Set the server Time Zone of your own choice

Backup User - Backup User are the users who can manage user/users account in their absence from work or simply can't access AIV for the set duration of time, Assigned Backup User can access user/users account for a set time allowing an organization to operate smoothly in the user/users absence. The User can easily Enable or Disable Backup User also can specify future dates.

Change Password - User can make changes to their login password to AIV.

- Click on Save icon 🔲 on the top right corner in Control Panel for changes to take effect.

Control Panel

Default Dashboard

Jitendra

Landing Page

Visualization/GridDashboard

Locale

English

Timezone

+5:30 IST Indian Standard Time

Backup User

Disabled

Change Password

Logout

Users can directly logout from their recent using account with the help of logout option.

Common Functionalities

AIV application offers the following common functionalities across all the sections of the applications which are as follows:-

1. Send Instant Messages to other users
2. Search
3. Check Admin Details
4. Navigate to Control Panel
5. Access Help documents