



Version 3.1.1 – 12.2022

User Guide

| | | |
|------------------|---|-------------|
| Document version | : | 1.0.1 |
| Product version | : | 3.1.1 |
| Date diffusion | : | 05/12/ 2022 |



PREFACE

Business 4 Mobile (B4M) is a web application that allows you to consult data from several data sources. The administrator defines the data sources (Database, files, etc.) in folders, then defines access to these folders. Users will be able to access these files to view the data in the results table, charts, and download them in PDF or CSV format.

This document serves as a guide to make it easier to get started with B4M.

Table des matières

| | | | | | |
|-----|---|----|-----|----------------------|----|
| 1 | B4M INITIALIZATION..... | 3 | 2.5 | Update Password..... | 11 |
| 1.1 | Presentation | 3 | 3 | B4M ADMIN | 12 |
| 1.2 | Welcome Initialization..... | 3 | 3.1 | Presentation | 12 |
| 1.3 | The configuration of the B4M database..... | 3 | 3.2 | Datasources..... | 13 |
| 1.4 | Customer setup | 3 | 3.3 | Folders | 17 |
| 1.5 | Mail server configuration..... | 4 | 3.4 | Queries | 21 |
| 1.6 | Add an administrator..... | 4 | 3.5 | Users | 27 |
| 1.7 | Successful initialization | 5 | 3.6 | Settings | 30 |
| 2 | B4M AUTHENTICATION | 6 | 3.7 | Logs | 32 |
| 2.1 | Login | 6 | 4 | B4M CLIENT..... | 33 |
| 2.2 | Password Reset | 7 | 4.1 | Presentation | 33 |
| 2.3 | Profile..... | 10 | 4.2 | Execute Query..... | 34 |
| 2.4 | Update Profile | 11 | 4.3 | Settings | 37 |



1 B4M INITIALIZATION

1.1 Presentation

Before using B4M, it is necessary to do a series of configuration steps from the initialization to the creation of the B4M super administrator.

1.2 Welcome Initialization

This interface represents the home screen for starting the basic configuration of B4M.

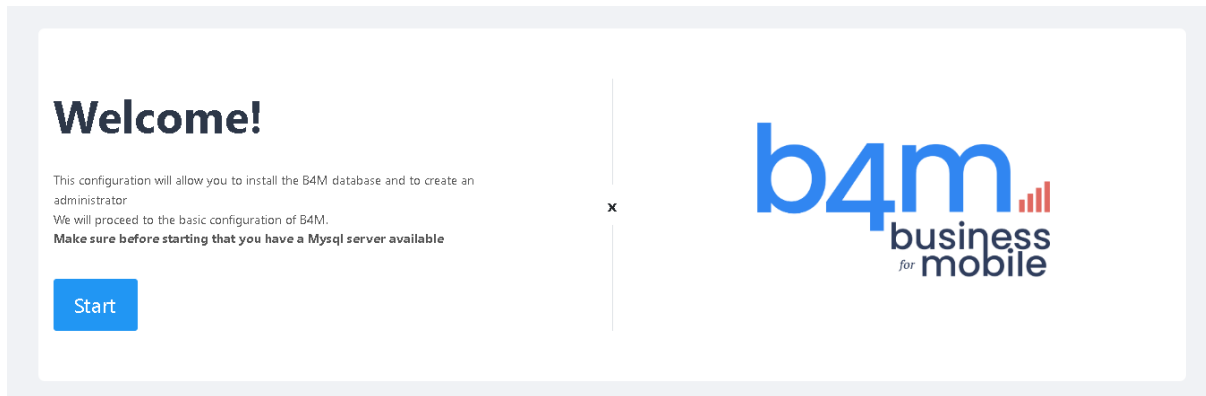


Image 1: Welcome initialization page.

1.3 The configuration of the B4M database

By clicking on “create the database” and then on “next” you will configure the b4m admin database and create the B4M tables then save the initialization parameters.

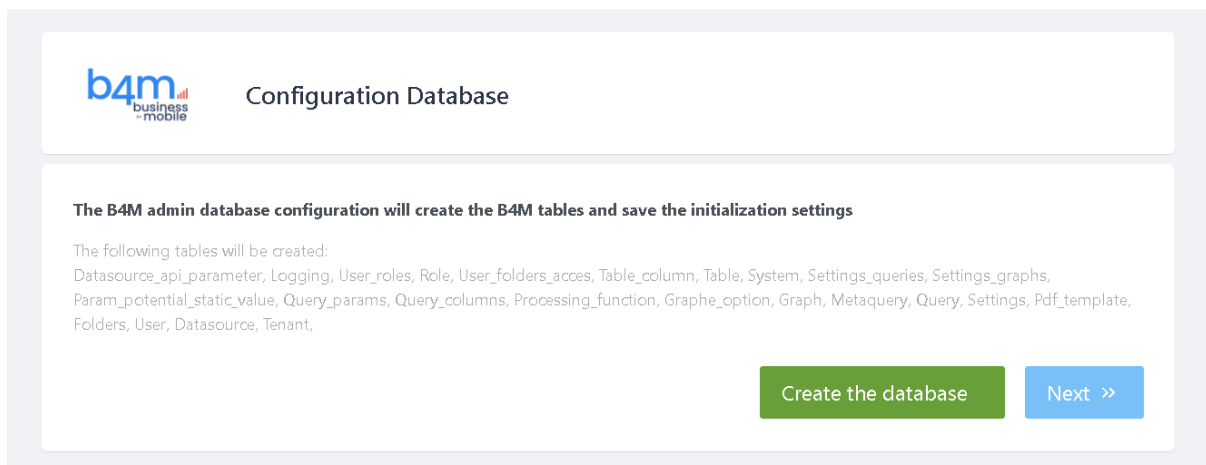


Image 2: The configuration of the b4m page.

1.4 Customer setup

This interface allows you to save the customer’s name and logo.

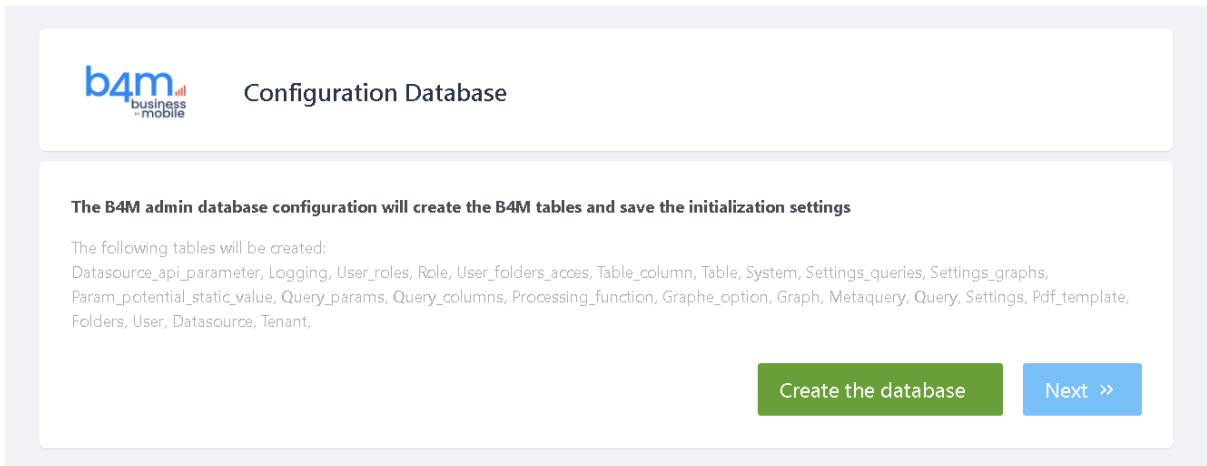


Image 3: The Customer setup page.

1.5 Mail server configuration

This configuration makes it possible to send requests by email, by clicking on “next”. And you can also skip this step by clicking on “ignore” to continue it in the parameters.

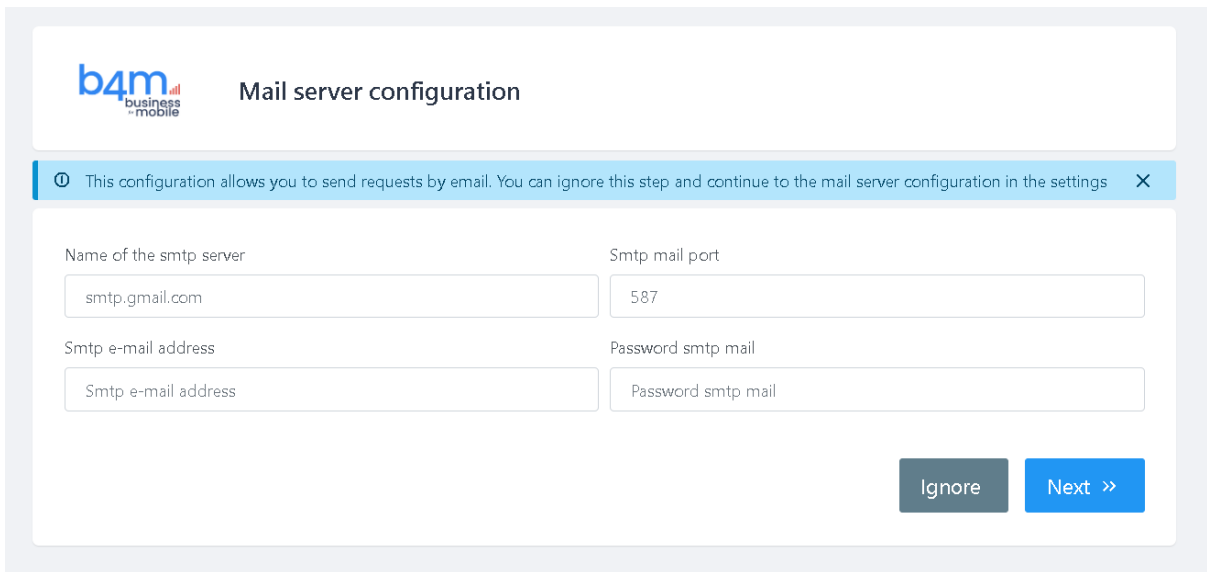


Image 4: Mail server configuration page

1.6 Add an administrator

This interface allows you to add the information corresponding to the B4M administrator.

b4m Add Admin
business for mobile

Username Email

First Name Last Name

Password Confirm Password

Next >>

Image 5: Add an administrator page.

1.7 Successful initialization

This interface lets you know that the initial configuration of B4M has been carried out successfully.

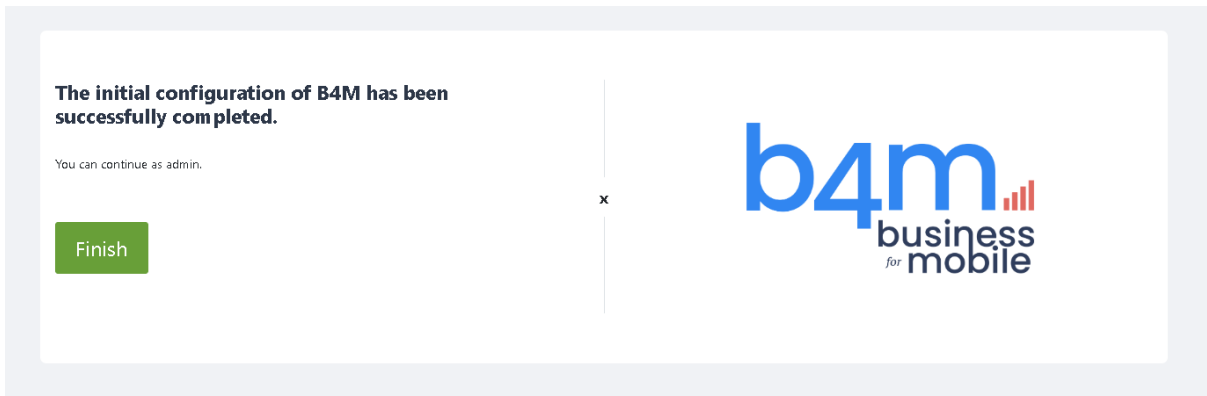


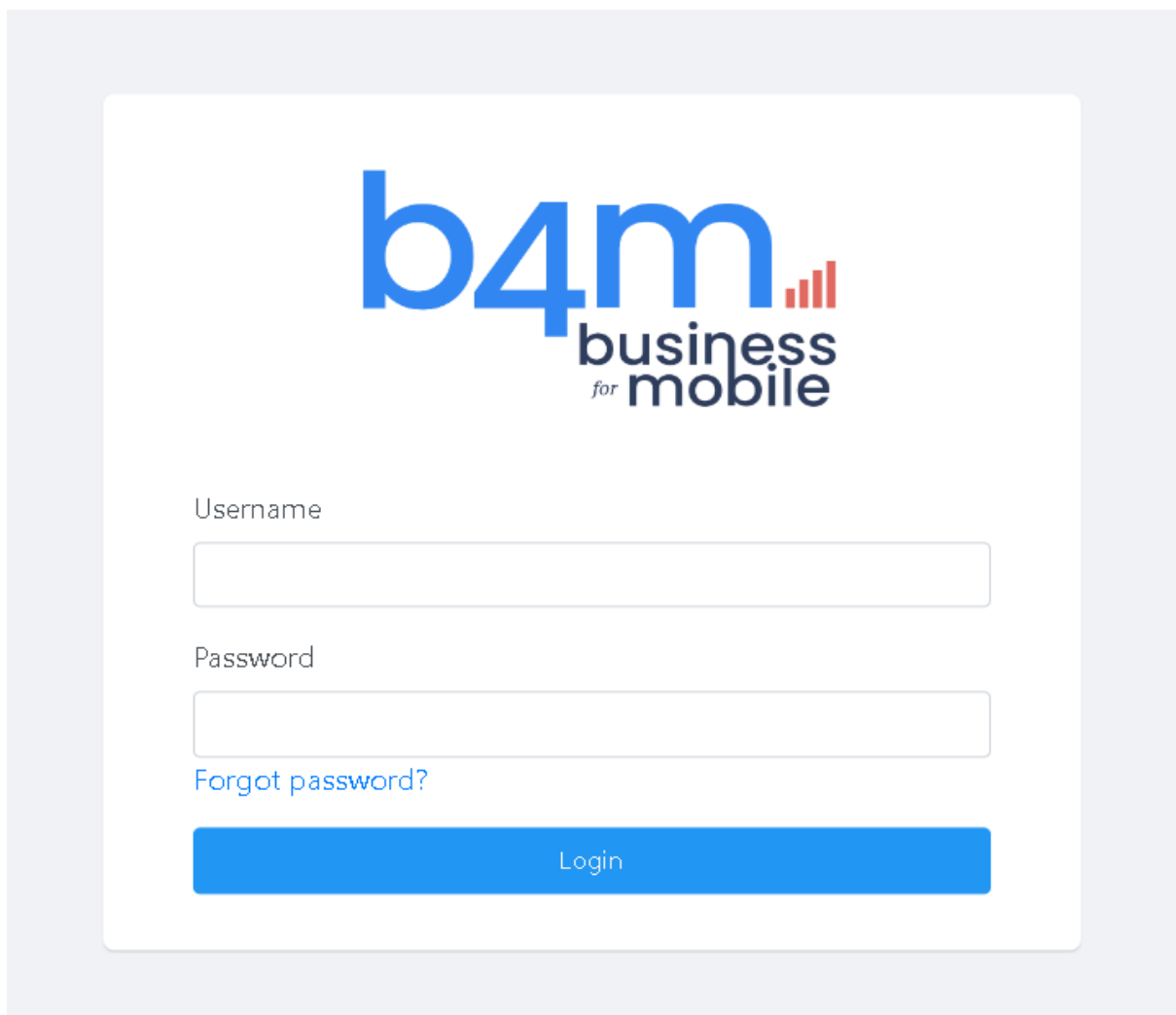
Image 6: Success configuration initial page.

2 B4M AUTHENTICATION

2.1 Login

Access to B4M requires an authentication phase. This is done on a page where the user is asked to provide his username and password.

If the user forgets the password, he/she can click on a link that appears below the password entry field. The link appears only if the mail server configuration has been done. If the mail server is not configured, the user must contact the administrator.



b4m
business
for mobile

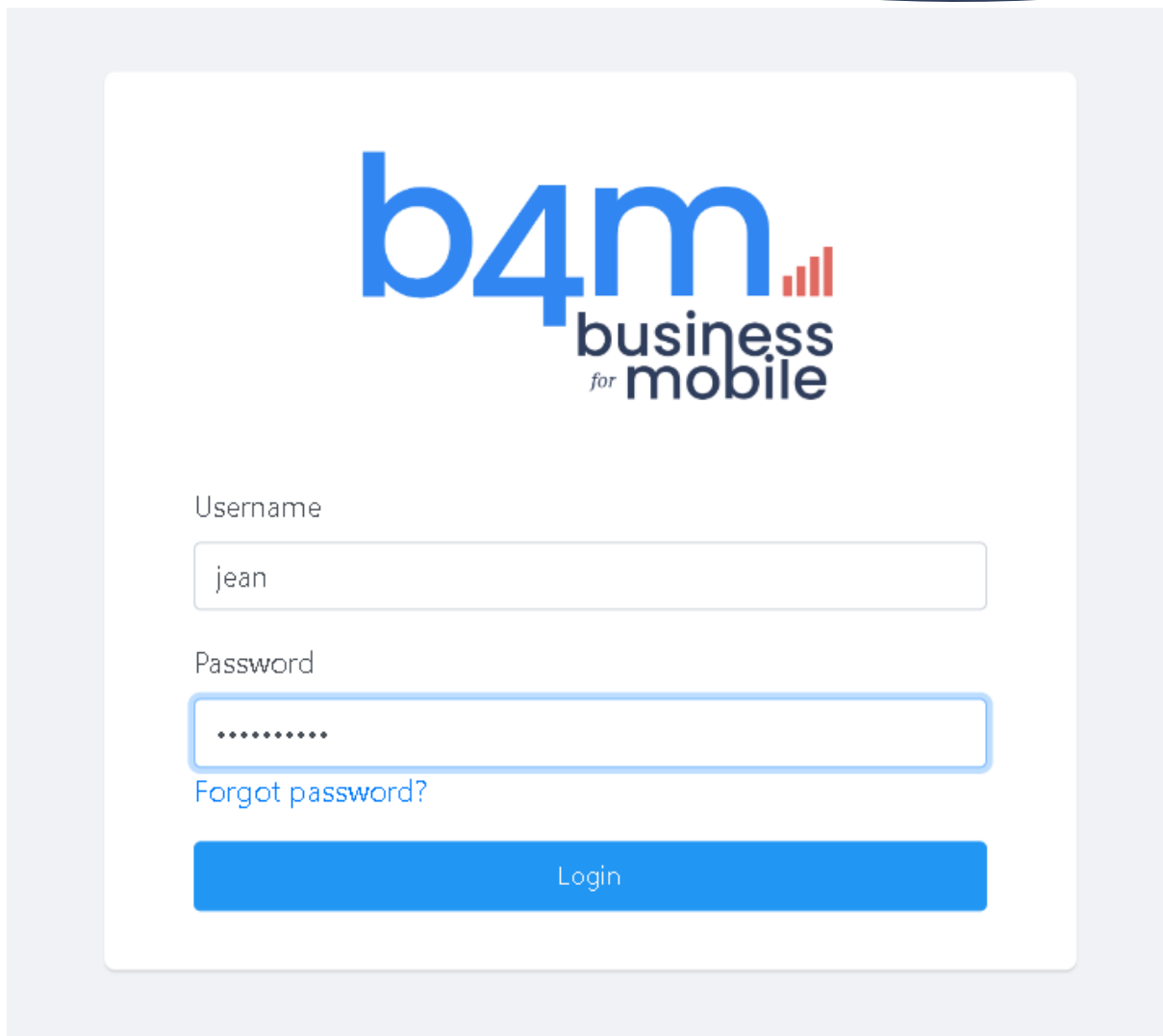
Username

Password

[Forgot password?](#)

Login

Image 7: Authentication page.



The image shows a login page for b4m business for mobile. At the top center is the logo, which consists of the text 'b4m' in a large blue font, with 'business for mobile' in a smaller black font below it. To the right of 'b4m' is a red bar chart icon. Below the logo, there are two input fields. The first is labeled 'Username' and contains the text 'jean'. The second is labeled 'Password' and contains a series of dots. Below the password field is a blue link that says 'Forgot password?'. At the bottom of the form is a large blue button with the text 'Login' in white.

Image 8: Authentication page with completed form.

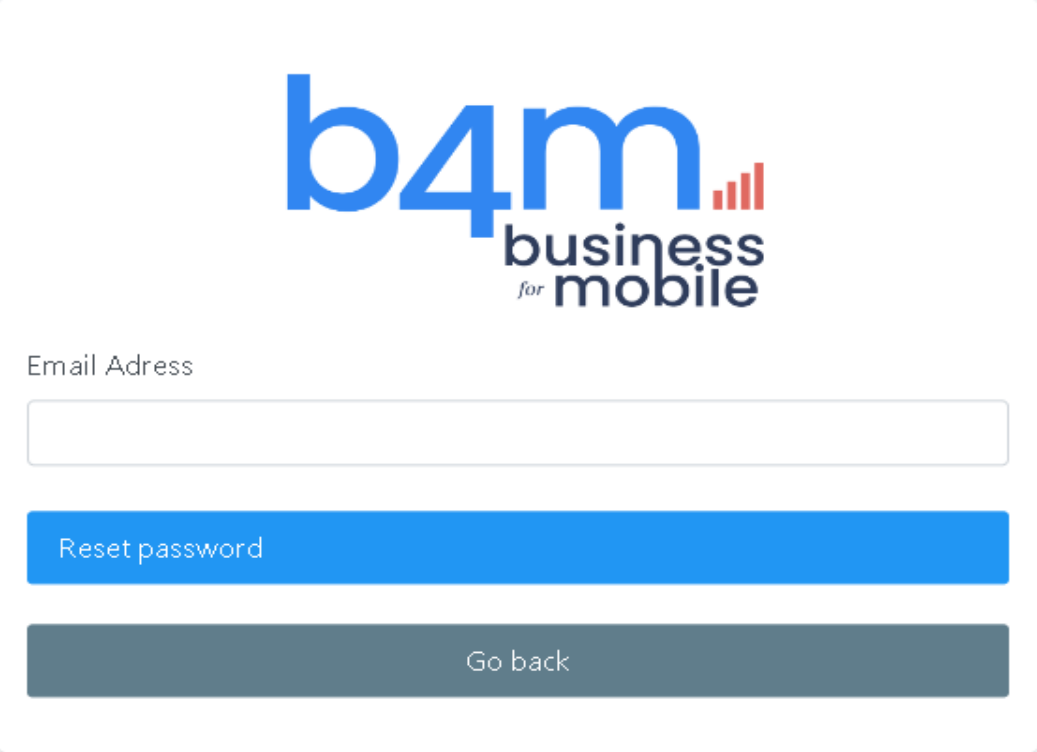
When the authentication is successful the user is redirected according to the role he has on B4M:

- If he has an administrator role then he is redirected to B4M-ADMIN
- If he has a simple role then he is redirected to B4M-CLIENT

2.2 Password Reset

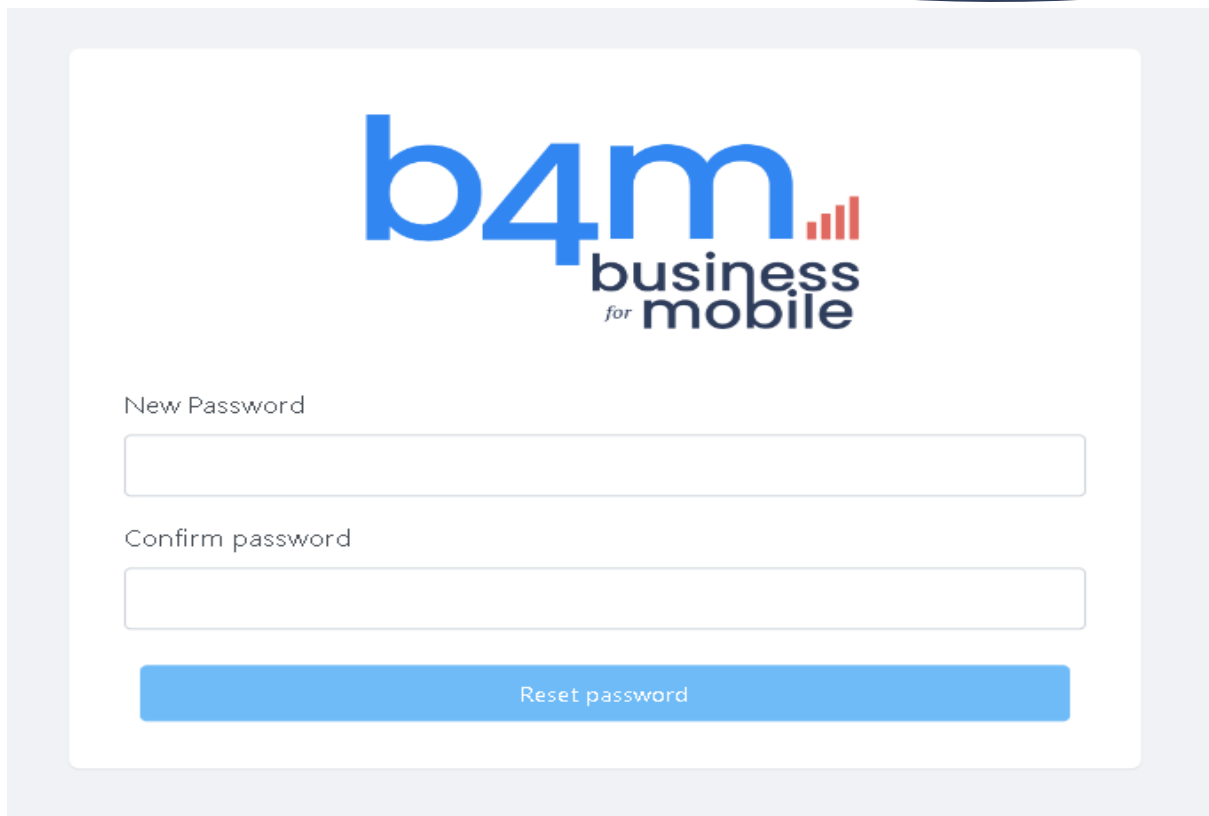
The password reset is done in two steps. In the first step, the user clicks on the "Forgot Password" link and is redirected to a page where he/she must provide his/her email address. When he fills in the right email address, the system sends him a reset link to his email box and notifies him through a message that appears on the screen.

In the second step, the user goes to his mailbox and clicks on the reset link. When he clicks on the link, a page will open where he will be asked to enter a new password and confirm the password. After the successful reset, the user will be notified of the success and will be offered a button to redirect to the authentication page.



The image shows a screenshot of a web form for password recovery. At the top center is the b4m logo, which consists of the letters 'b4m' in a large blue font, with 'business for mobile' in a smaller black font below it. To the right of 'b4m' are three vertical red bars of increasing height. Below the logo, the text 'Email Adress' is positioned above a white rectangular input field. Underneath the input field are two buttons: a blue button with the text 'Reset password' and a dark grey button with the text 'Go back'.

Image 9: Password recover Email form.



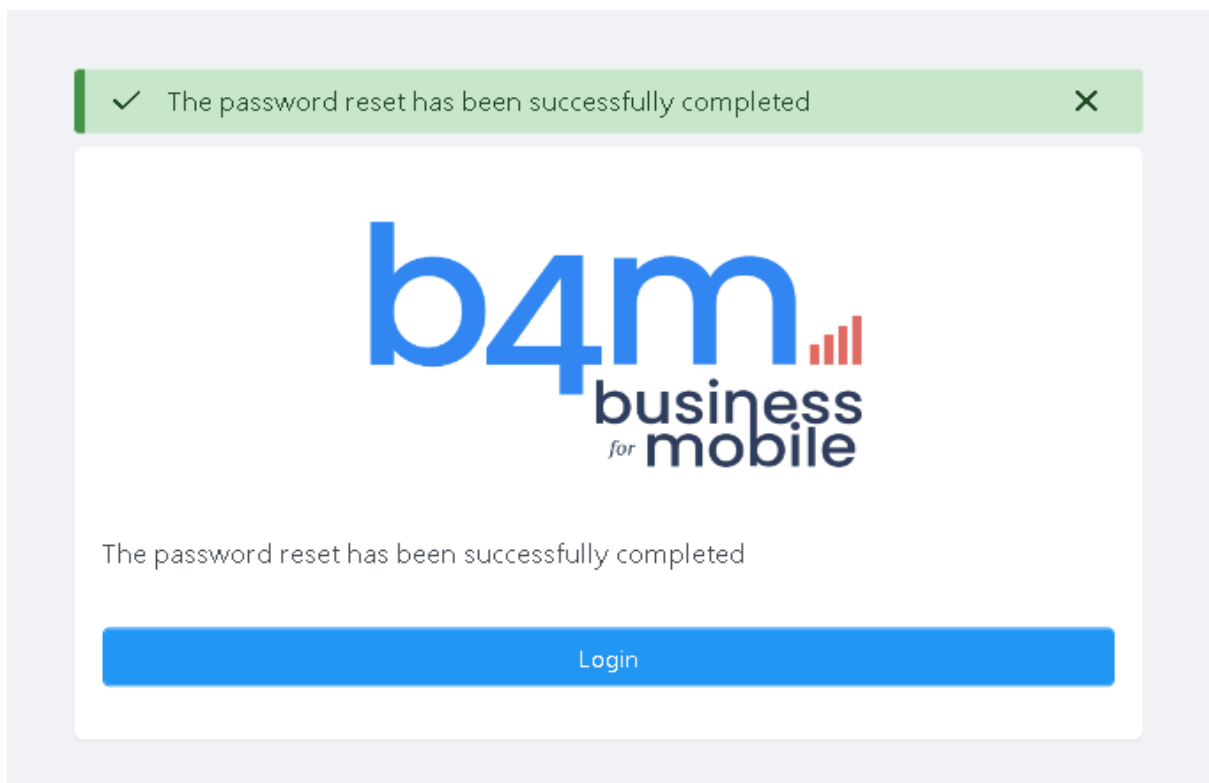
b4m
business
for mobile

New Password

Confirm password

Reset password

Image 10: Password recover form.



✓ The password reset has been successfully completed

b4m
business
for mobile

The password reset has been successfully completed

Login

Image 11: Password recover login.

2.3 Profile

The profile in B4M represents the part where the user accesses functionalities allowing him to modify his information.

PROFILE is composed of two or three functionalities; one that allows you to modify the user's profile, another that allows you to modify the user's password, and last that allows the user to choose the content that should be displayed on his Dashboard.

From the click of the profile icon on the navigation bar of the application, a drop-down menu opens with the following sections:

Information: displays the user's first and last name

- 1- Edit Profile: A clickable section that redirects to the edit user page.
- 2- Password: a clickable section that redirects to the user's change password page.
- 3- Settings: a clickable section that redirects to the settings page. This option depends on the user's role (Can be seen if the user is not an admin).

Logout: a clickable section that logs out the user

When the "Logout" section is clicked, the user is logged out and redirected to the login page (LOGIN).

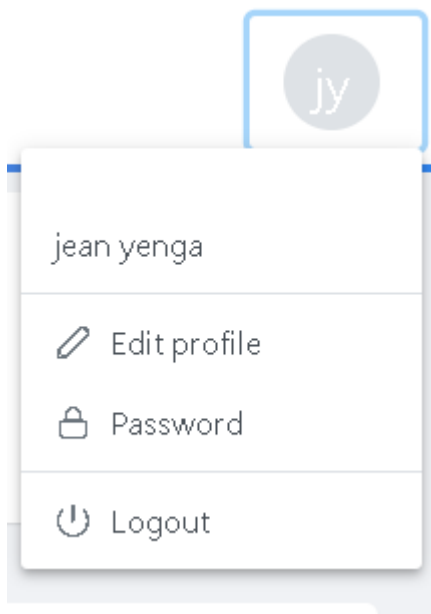


Image 12: profile admin drops down menu

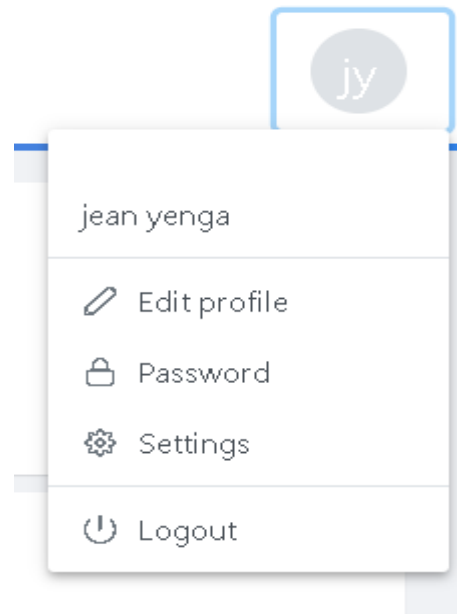


Image 13 : profile client drop down menu

2.4 Update Profile

Updating a profile allows the user to change any information except the username.

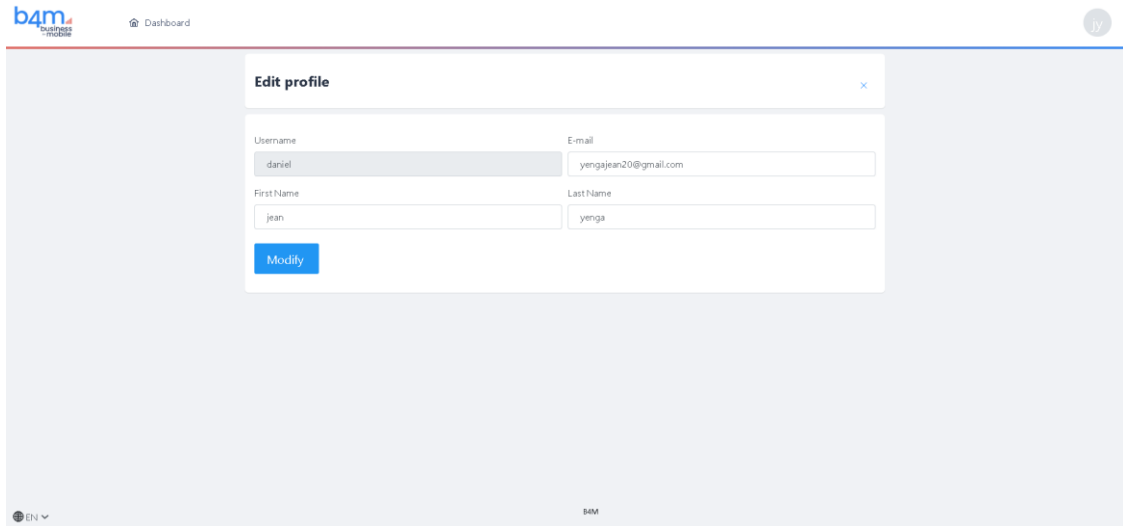


Image 14: Edit profile form.

2.5 Update Password

The password update is done on a page where the user is asked to provide the old password, the new password, and the password confirmation.

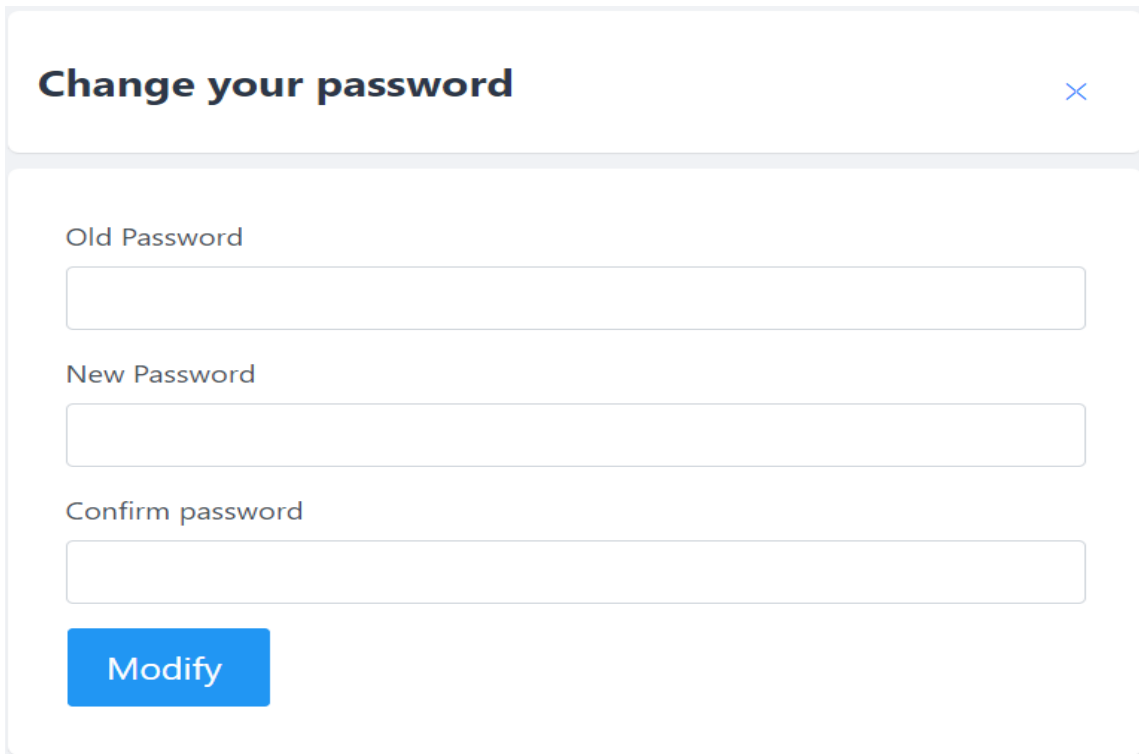


Image 15: Update Password.

3 B4M ADMIN

3.1 Presentation

B4M-ADMIN is the part of B4M where the management of data sources, folders, queries etc. is defined. It is composed of a menu which in turn is made up of 6 sub-menus.

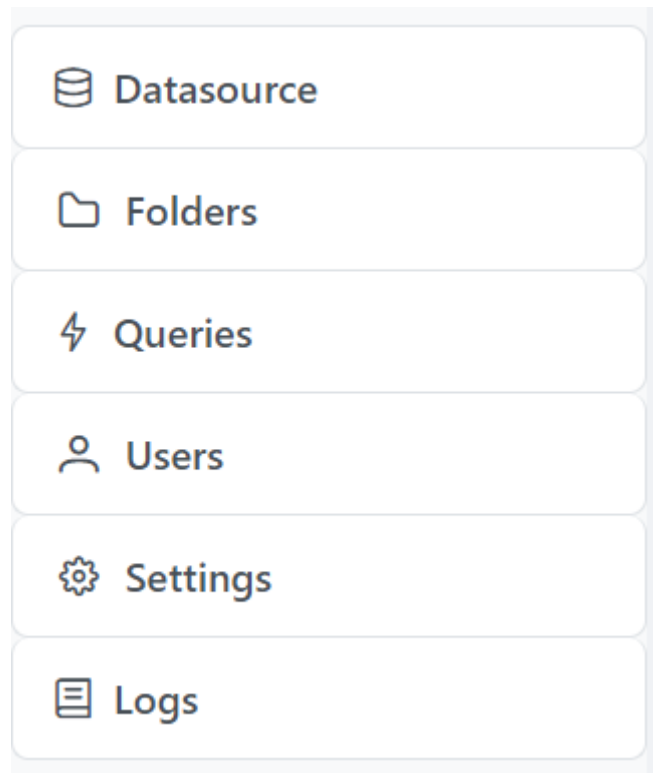


Image 16: Menu of B4M ADMIN.

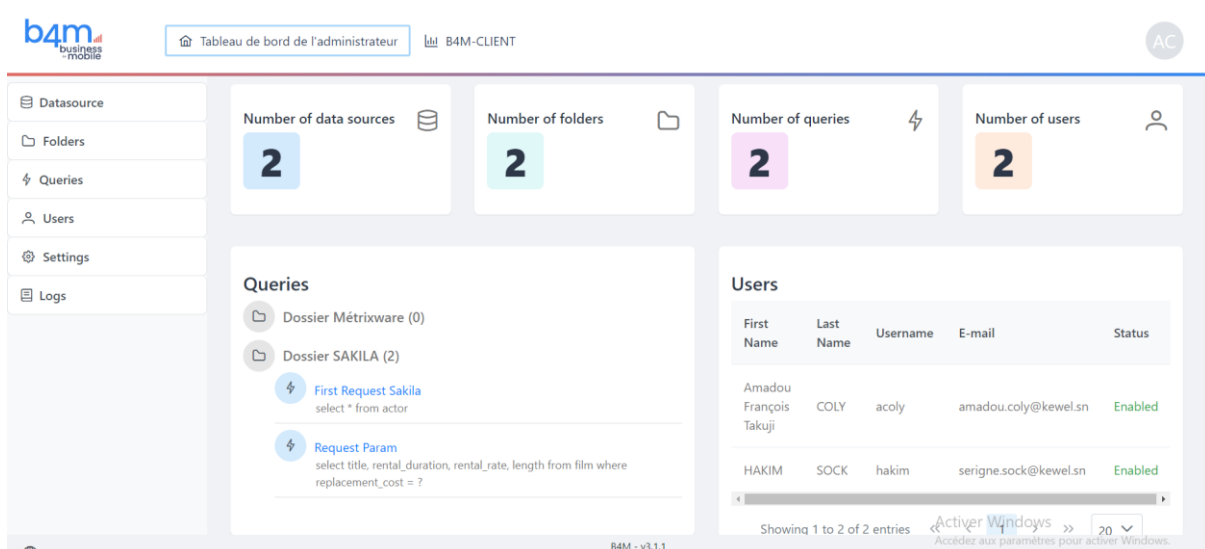


Image 17: Dashboard of B4M ADMIN.

B4M ADMIN has as home page a dashboard where it lists different statistics of the application such as the number of data sources, the number of folders, the number of requests ...

There is also a zone that contains the requests divided by folders and another zone that lists all the users of the application.

3.2 Datasources

Data sources in B4M represent databases, APIs or files where queries will be executed to retrieve data. B4M-ADMIN-DATASOURCE is composed of features that allow you to add, modify, delete a data source.

The data sources have a home page with a button to add a data source and below this button there is a table containing all the data sources. The data sources in the table are organized in pages and the number of elements per page can be changed according to the user. The data in the table can be sorted or filtered and on each row of the table there are two buttons allowing to modify or delete a data source.

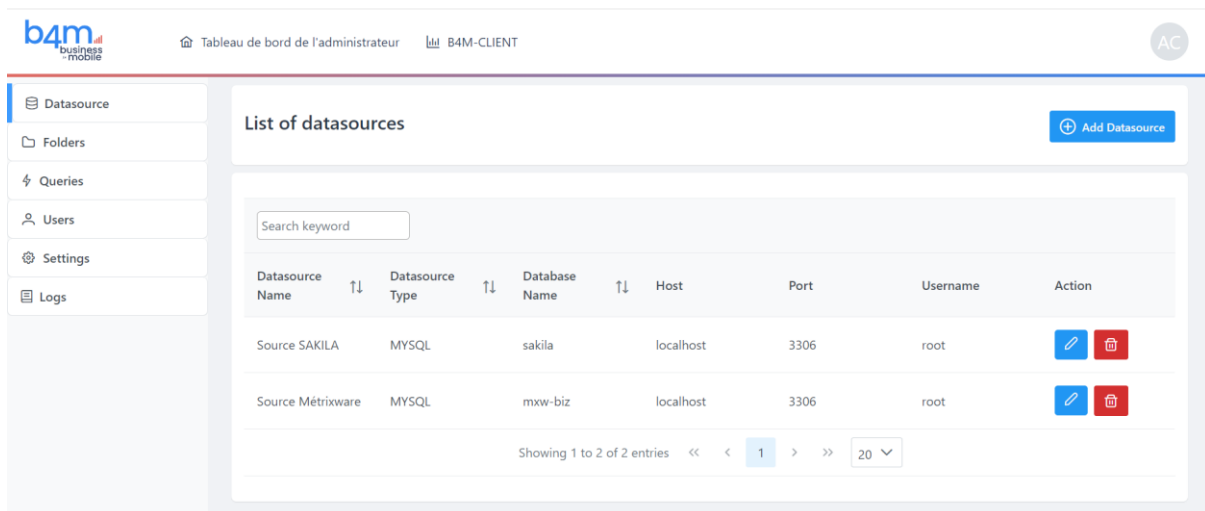


Image 18: Data sources home page.

3.2.1 Add datasource

The add data source page is composed of a form that allows you to fill in the name of the data source and the type of data source. The display of the additional input fields will depend on the type of the data source chosen. If the type is other than an API then the input fields database name, host, port, username and password are displayed.

If the type is an API, then an area to enter the API URL is displayed. It is followed by a table with a button to add parameters to this API.

- At the end of the form, there are three buttons aligned that allow respectively to:
- Add a data source and go back to the data sources home page.
- Add a data source and stay on the add form by clearing the form fields to allow the user to add another data source if they wish.

- Test the data source to see if it is accessible.

When a data source is successfully added, a message is displayed on the screen to notify the user.

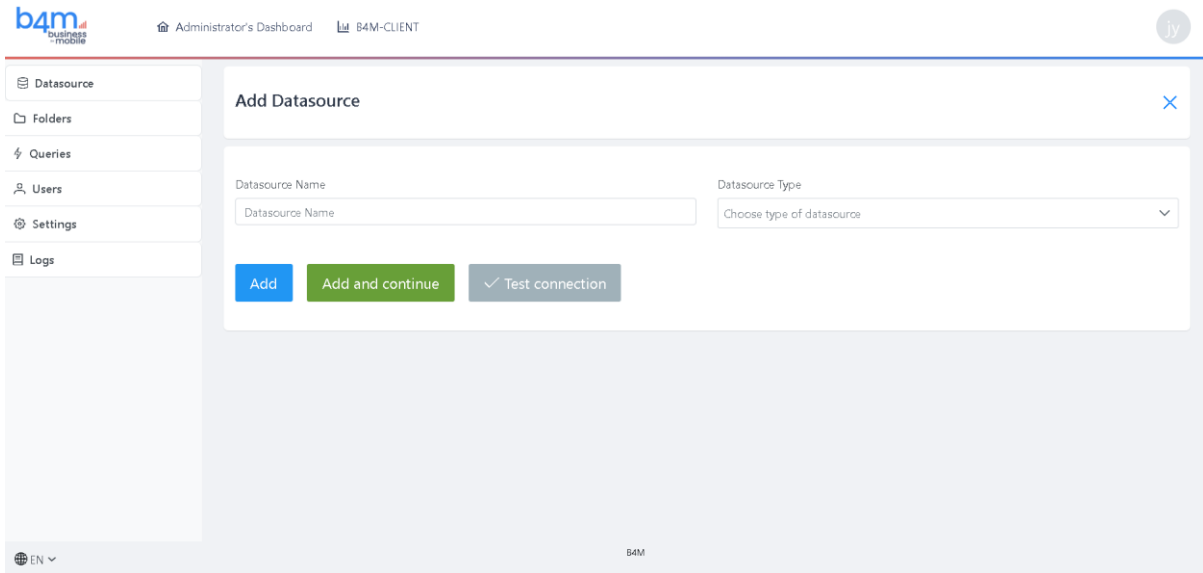


Image 19: Add data source page.

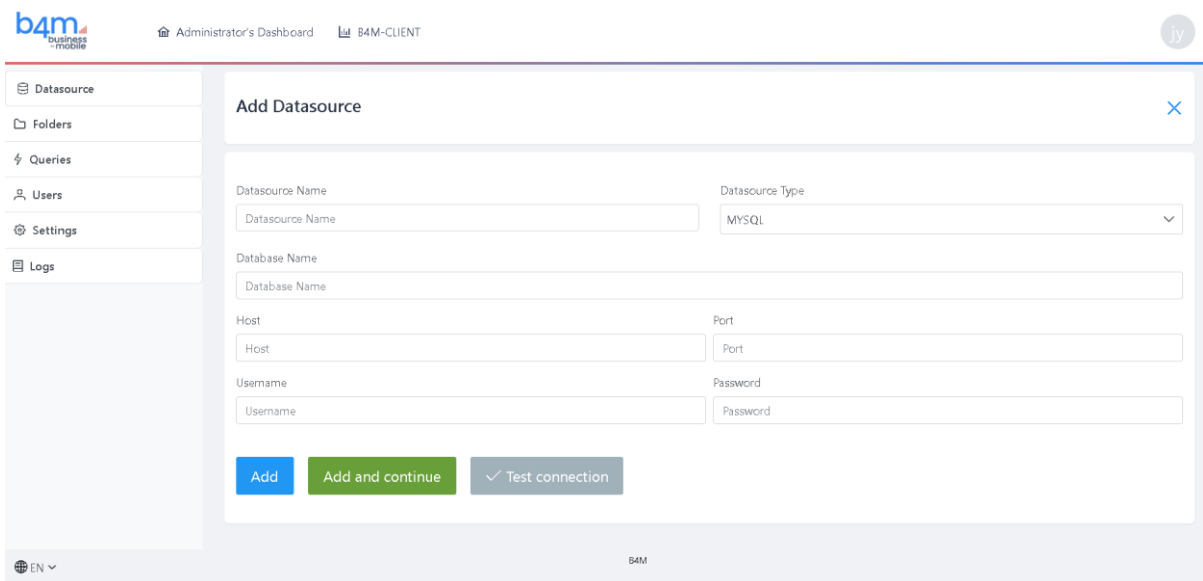


Image 20: Add no API data source.

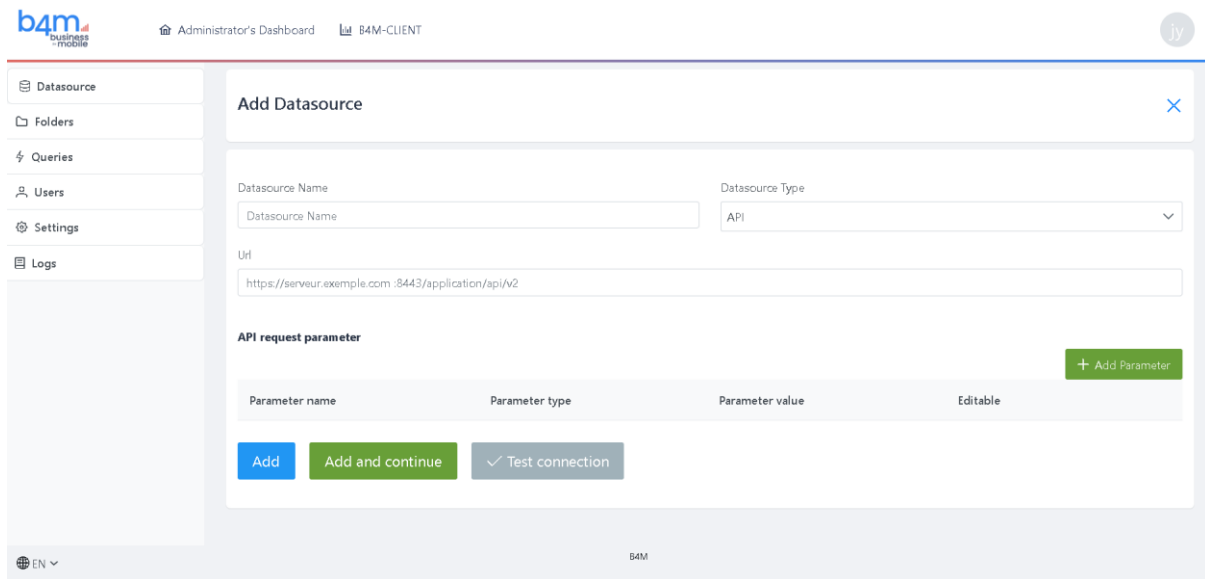


Image 21: Add data source API page.

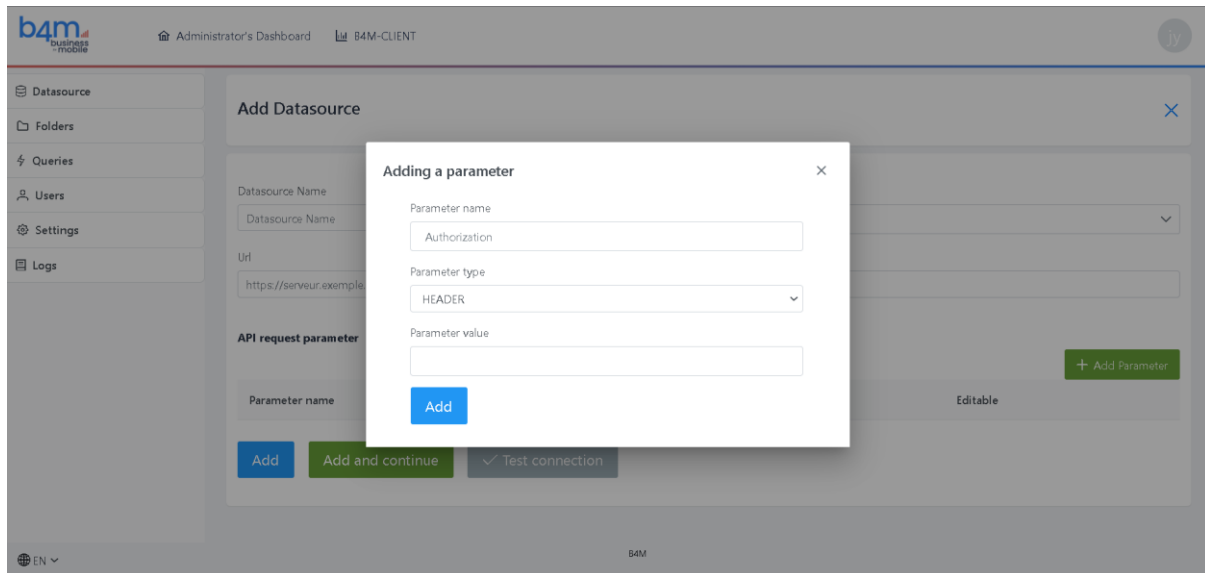


Image 22: Adding a parameter API page.

3.2.2 Modify data source

The data source edit page loads the information from a data source onto a form. All input fields are editable except the data source type field which is disabled.

At the bottom of the form, there are three aligned buttons that allow respectively to:

- Modify the data source and return to the data source home page.
- Modify the data source and stay on the form to allow the user to further modify the data source if they wish.
- Test the data source to see if it is accessible.

When a modification is successful, a message is displayed on the screen to notify the user.

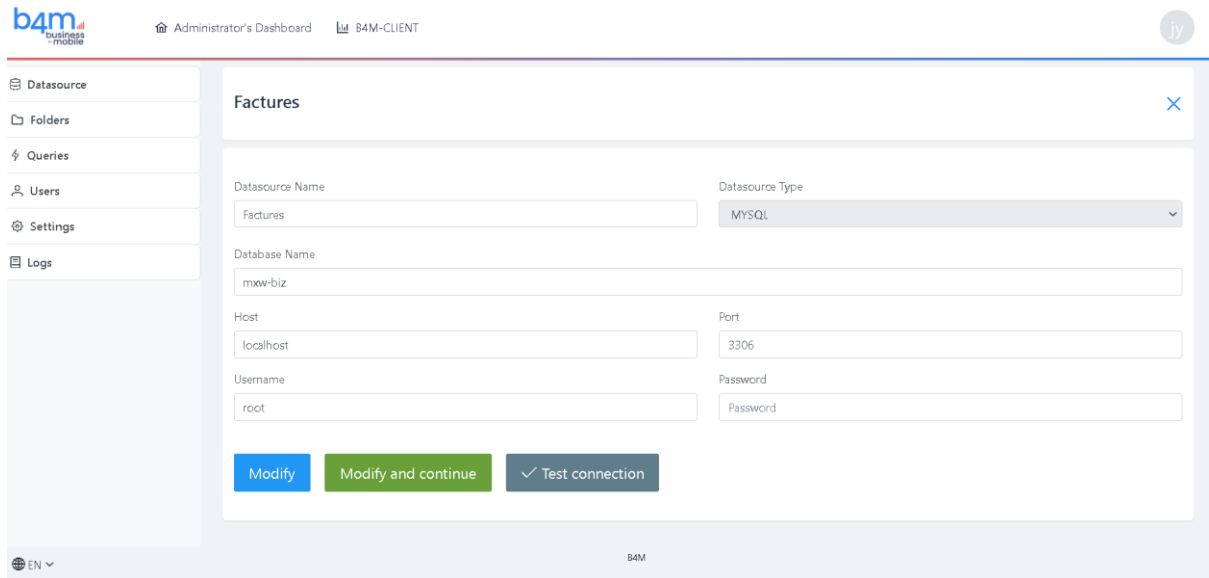


Image 23: Modify a data source MySQL page.

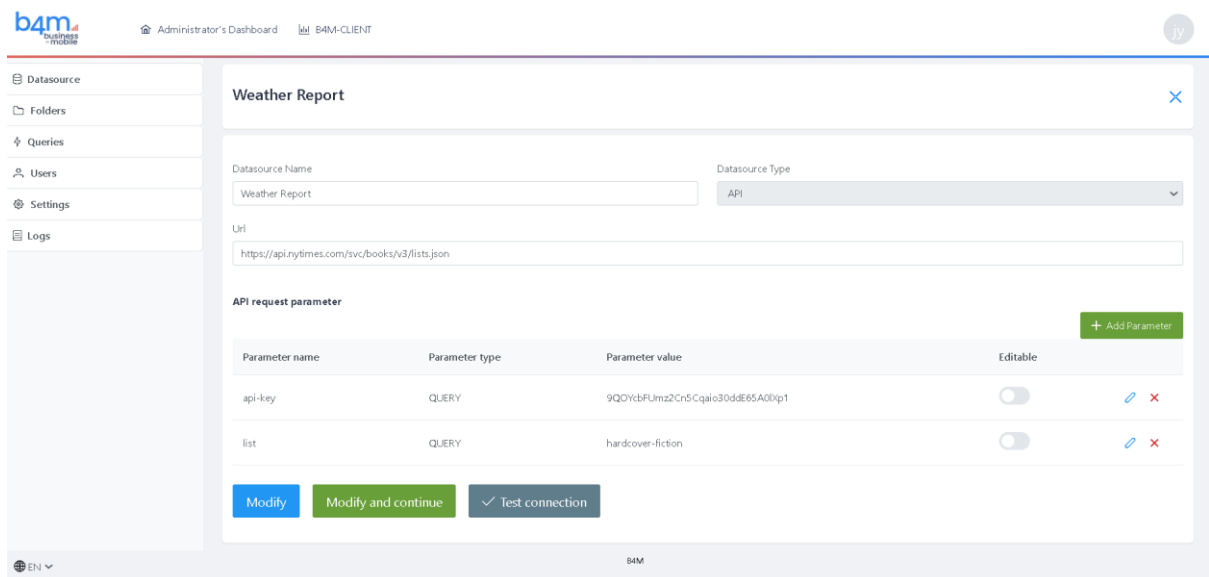


Image 24: Modify a data source API page.

3.2.3 Delete data source

To delete a data source, the user goes to the data source home page, looks at the source to be deleted and clicks on the delete button which is red in colour. When he clicks on this button then a confirmation window is presented to him to confirm the deletion. If the source is linked to folders, then a message is displayed to warn him on the same confirmation window.

If the deletion is successful, then a message is displayed to notify him.

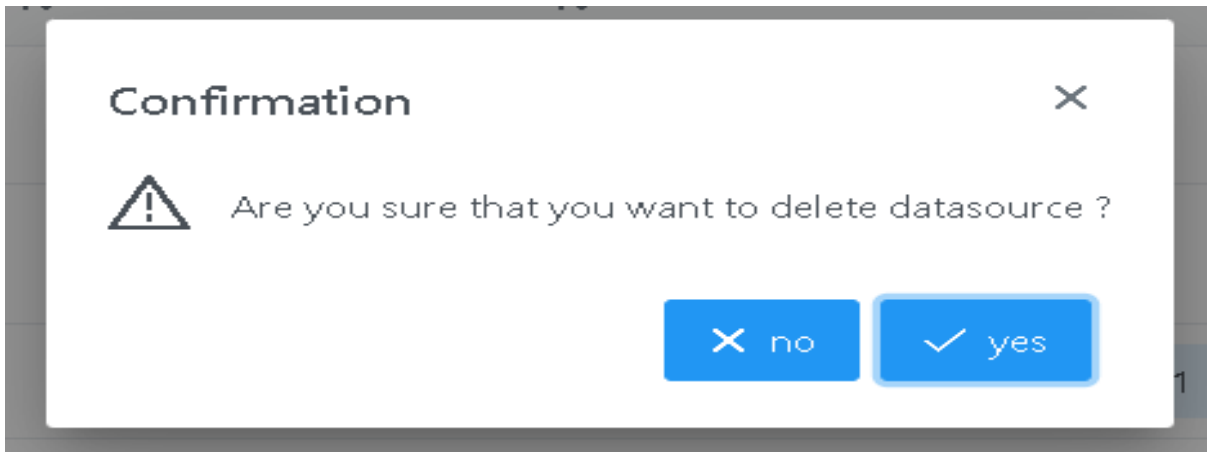


Image 25: Pop up deleting a data source that does not contain a folder.

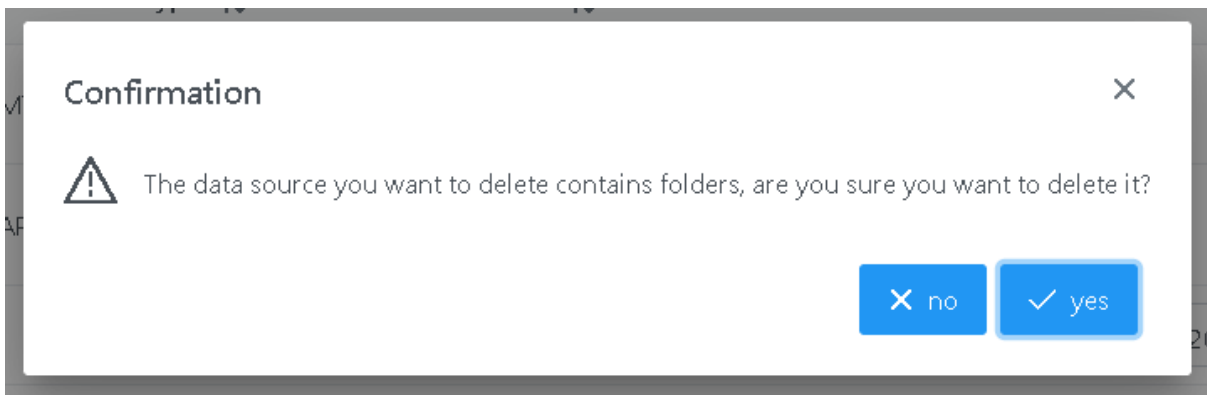


Image 26: Pop up deleting data source that contains a folder.

3.3 Folders

The folders in B4M represent folders of queries. The folders have a home page with a button to add a folder and under it there is a table that contains all the folders divided by pages. The folders can be sorted or filtered, and, on each line, there are two buttons to modify or delete a folder.

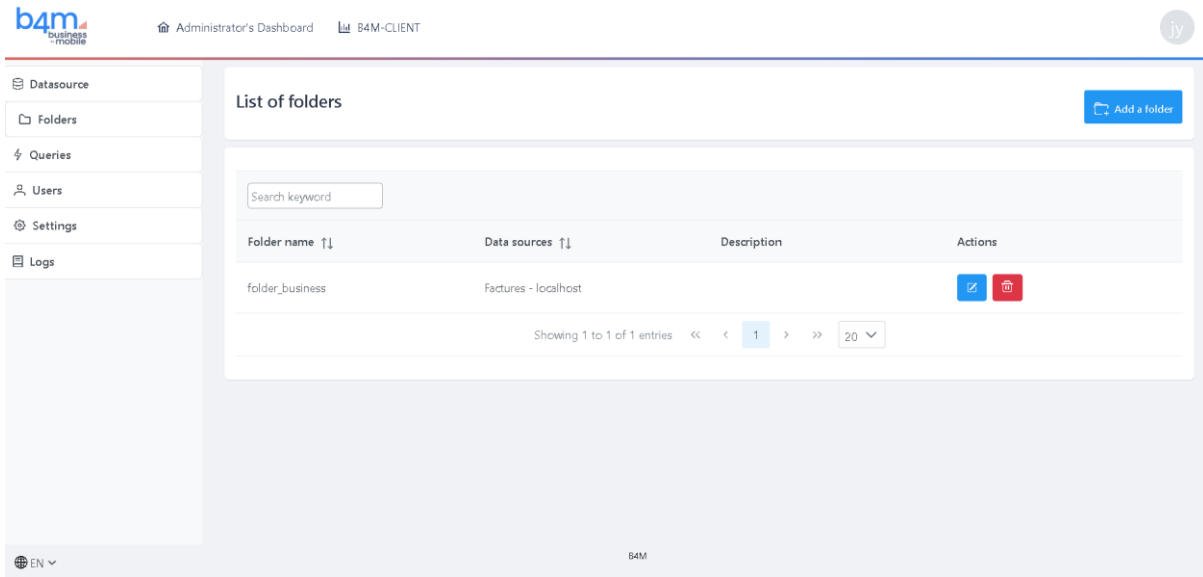


Image 27: List of folders page.

3.3.1 Add folder

Adding a folder is done in two steps. On the first step, a form is presented to the user where he/she fills in the name of the record, chooses the data source with which the record should be linked and makes a description of the record (the description is optional). After entering the data, the user must click on the next button. If the input is correct, the user goes to the second step. On the second step, the user selects the users who should have access to the folder. He unfolds a drop-down list and ticks those who should have access to the folder, and he must click on the finish button to complete the creation of the folder.

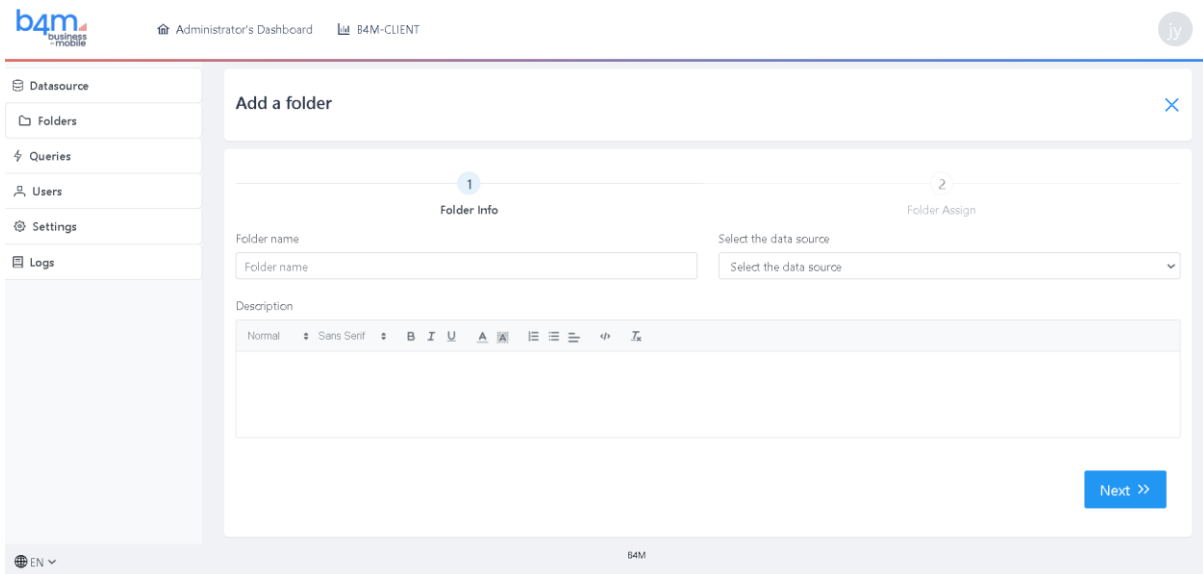


Image 28: Add a folder 1st step.

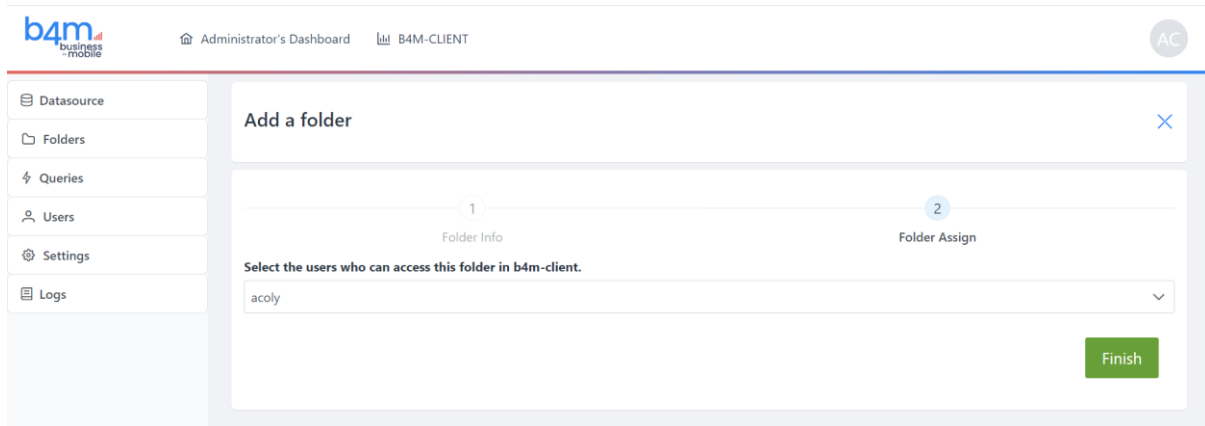


Image 29: Add a folder 2nd step.

3.3.2 Modify folder

The page for editing a folder loads the information for a folder where the information is divided into two tabs. On the first tab there is a form that contains the name, data source and description of the folder and on the second tab there is a list of users who should have access to the folder. Below the tabs, there are two buttons that allow you to save the changes and go to the homepage of the folders or save the changes and stay on the folder in question.

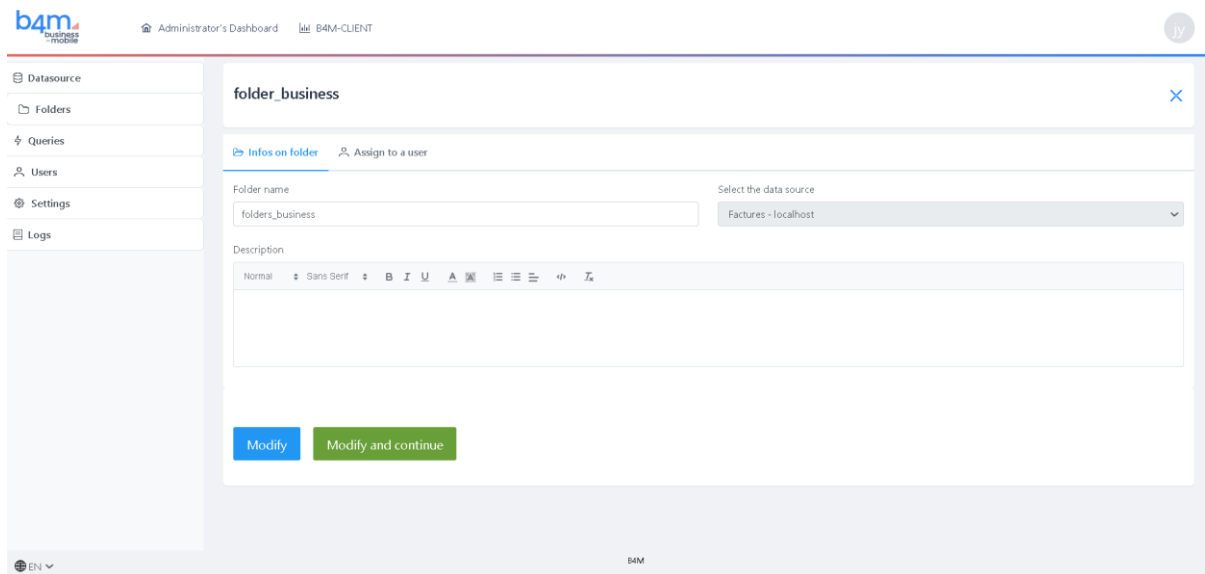


Image 30: Modify folders page.

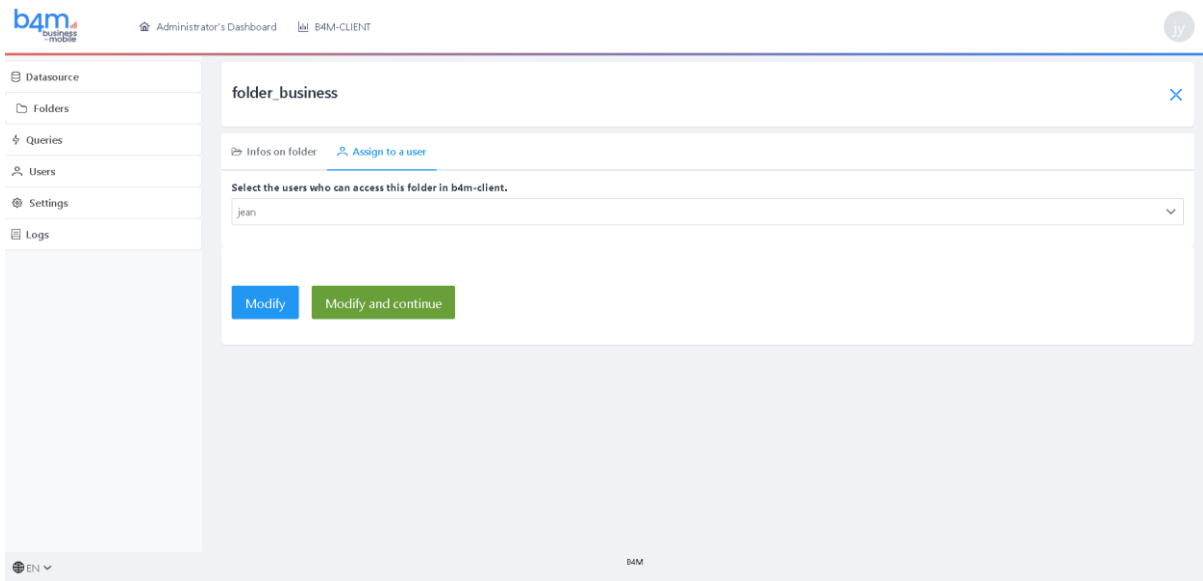


Image 31: Assign to a user page.

3.3.3 Delete folder

To delete a folder, the user goes to the folders home page, targets the row of the folder to be deleted and clicks on the delete button which is red in colour. After clicking the button, a confirmation window appears to confirm the deletion. If the folder is linked to requests, a warning message is displayed on the same confirmation window. After confirmation, a notification is presented to say whether the deletion was done successfully or not.

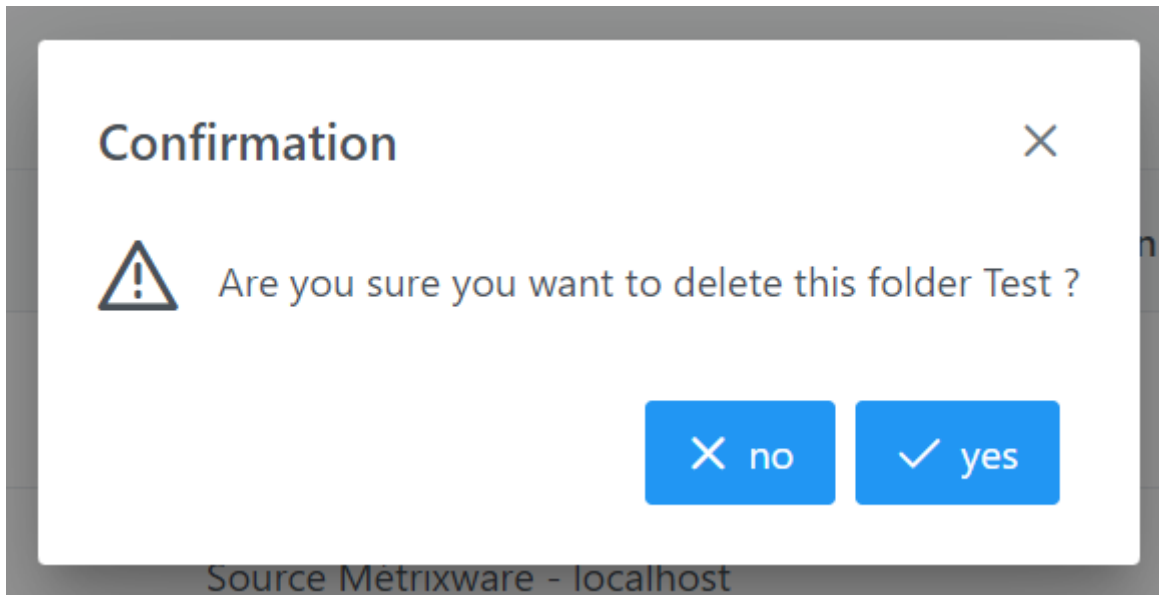


Image 32: Pop up deleting a folder.

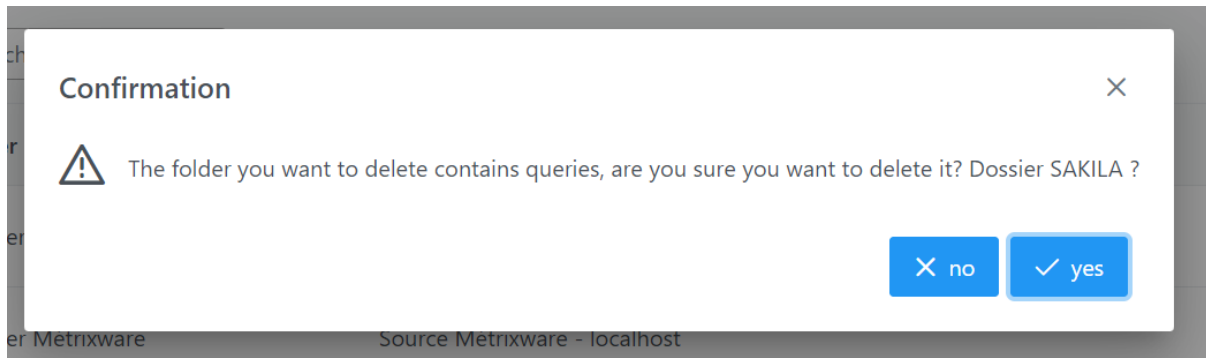


Image 33: Pop up deleting a folder containing queries.

3.4 Queries

Queries are the most important part of B4M. Queries have a home page with a button to add a query and under this button there is a table containing all the queries. The queries in the table can be sorted or filtered and are organized in pages. On each row of the table there are three buttons to edit, delete or copy a query.

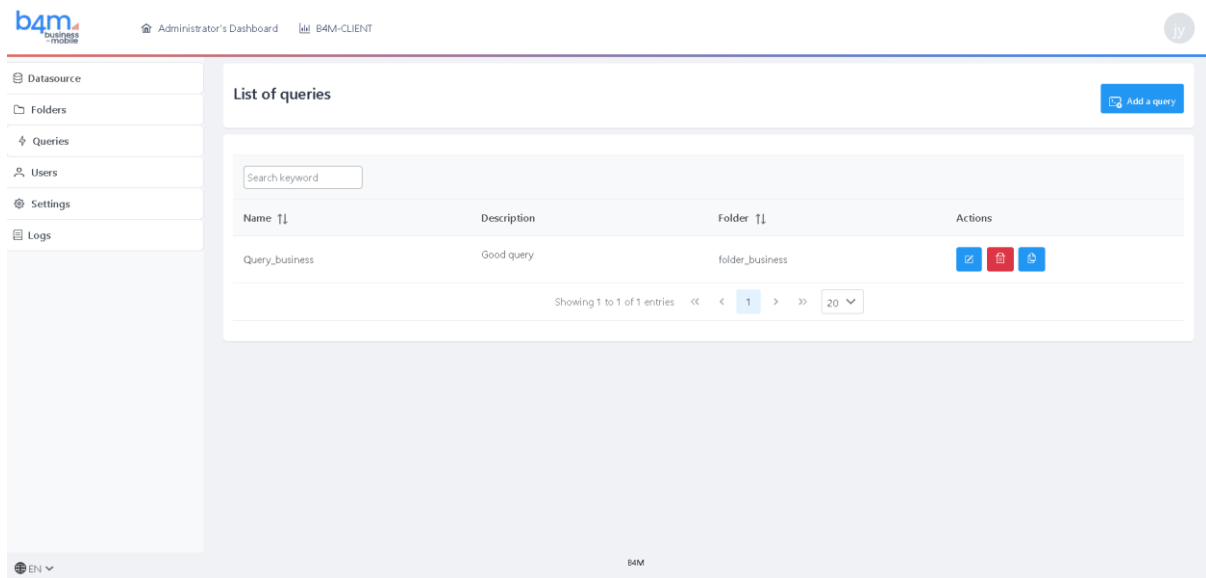


Image 34: Lists of queries Page.

3.4.1 Add query

The creation of a request is done in four steps.

3.4.1.1 Information

On the first step, the user fills in a form with the information of the query such as the name of the query, the folder of the query, the description of the query which is not mandatory. If the folder chosen by the user is a linked folder with an API data source, then an additional field is displayed on the form where he chooses the attribute that contains the API result.

If the folder is not linked to a non-API data source, then the user fills in a text field with the SQL query that should be executed. Below the form there are two buttons, one of which allows you to test if the query works and the other to go to the next step.

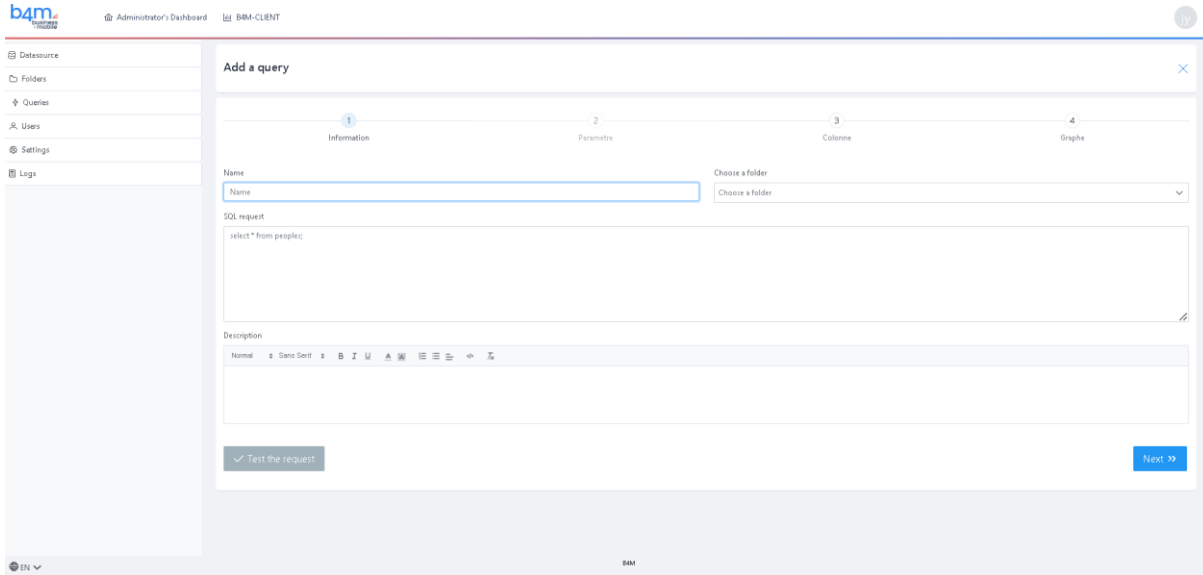


Image 35: Add SQL Query First Step.

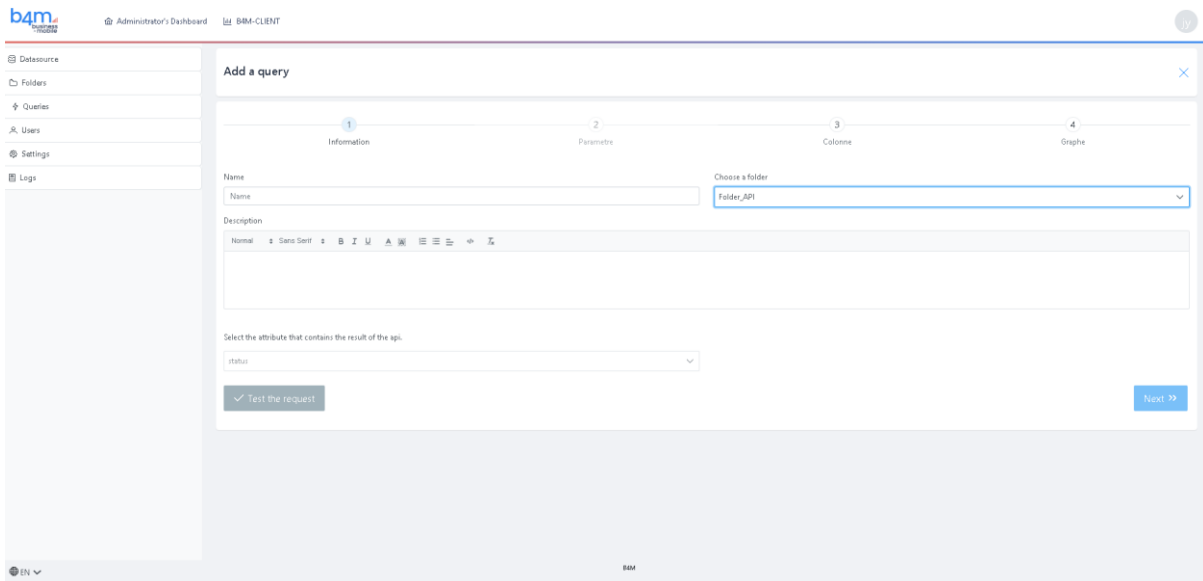


Image 36: Add Query API First Step.

3.4.1.2 Parameter

The second step is the part where the parameters detected in the SQL query that the user has entered are detailed. In this part, the parameters are contained in a table and each parameter can be edited using the button in the Action column of the table. When this button is clicked, a dialog box containing a form opens and asks the user to fill in the details of the parameter.

After finishing filling in the details, the user must click on the submit button to return to the settings table. Below the table there are two buttons, one of which allows you to finish the creation of the request and another one which allows you to go to the third step.

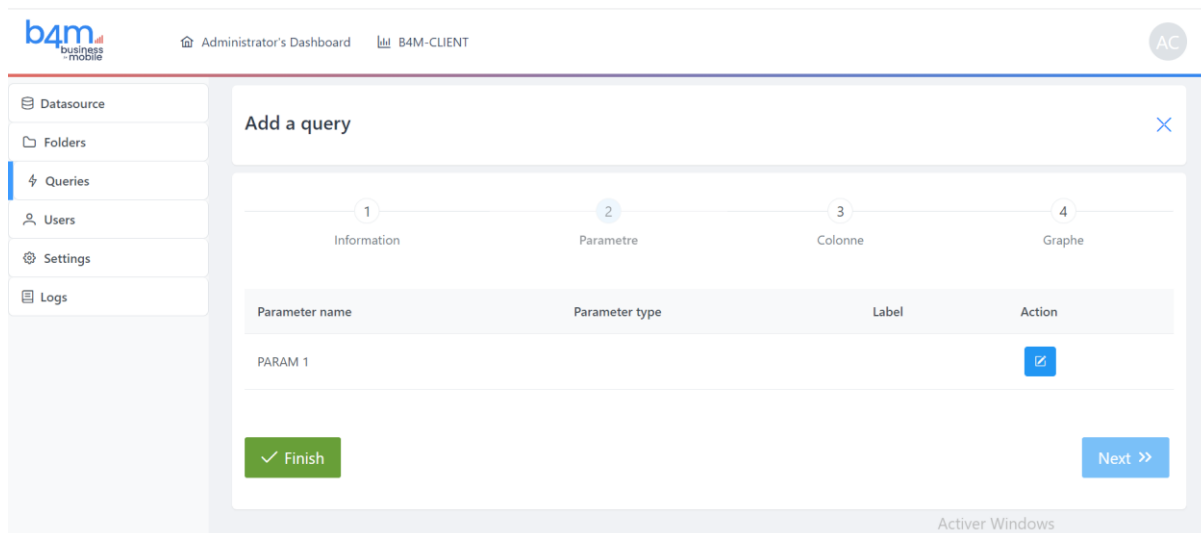


Image 37: Add Query Second Step.

3.4.1.3 Columns

The third step is related to the configuration of the columns of the query result. The columns are presented in a table where the user will have the possibility to make modifications such as ordering the columns, renaming the columns, sorting, filtering, or hiding columns. He can also add one or two function methods to a column thanks to a window that appears when he clicks on the button located in the Function column of the table. Below the table there are two buttons, one of which allows you to finish the creation of the query and display the query in edit mode, and the other to go to the last step.

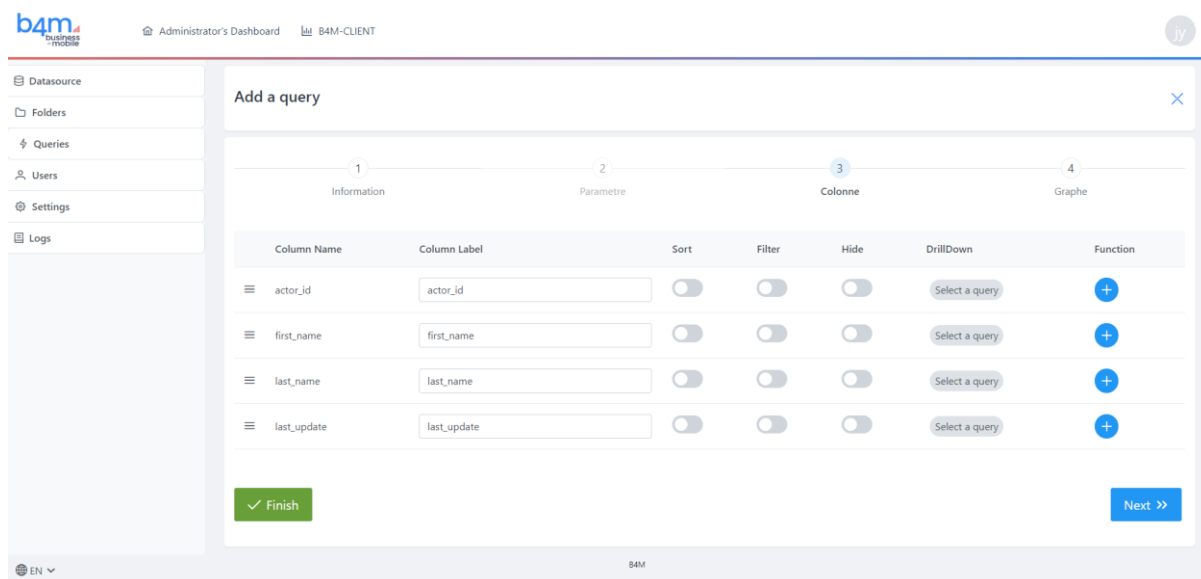


Image 38: Add Query Third Step.

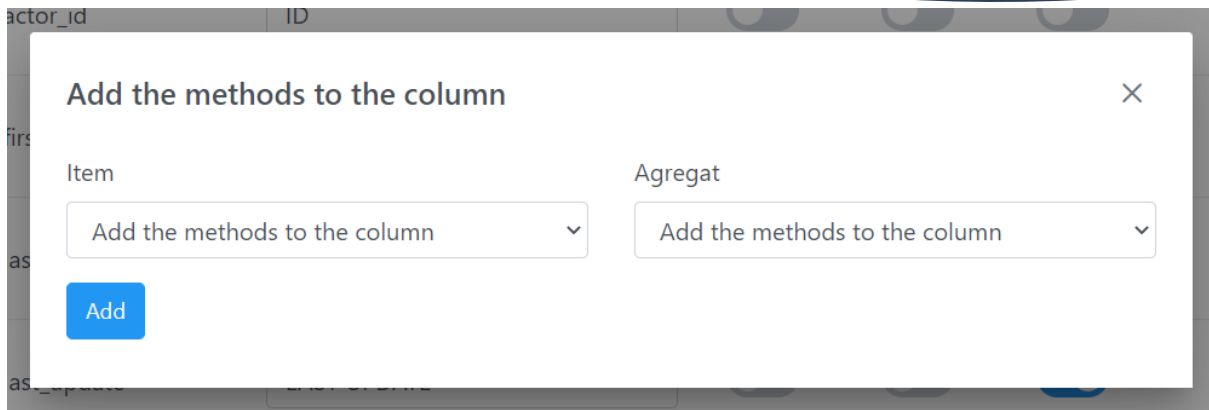


Image 39: Add Query Third Step - Add methods for a column.

3.4.1.4 Graph

The last step consists in allowing the user to add graphs to the query. To do this, he clicks on the button add a graph to display the form for adding a graph on a dialog box. He fills in the necessary information for the graph and clicks on the validate button to add the graph on a table. He can add other graphs if he wants and if he finishes, he clicks on the finish button to finish the creation.

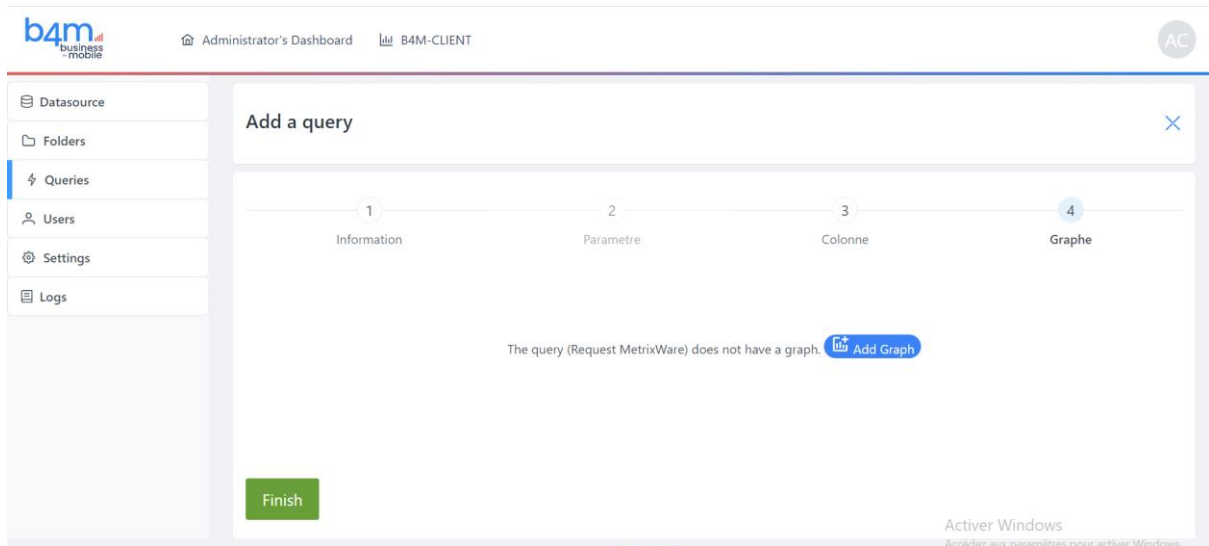


Image 40: Add Query Last Step.

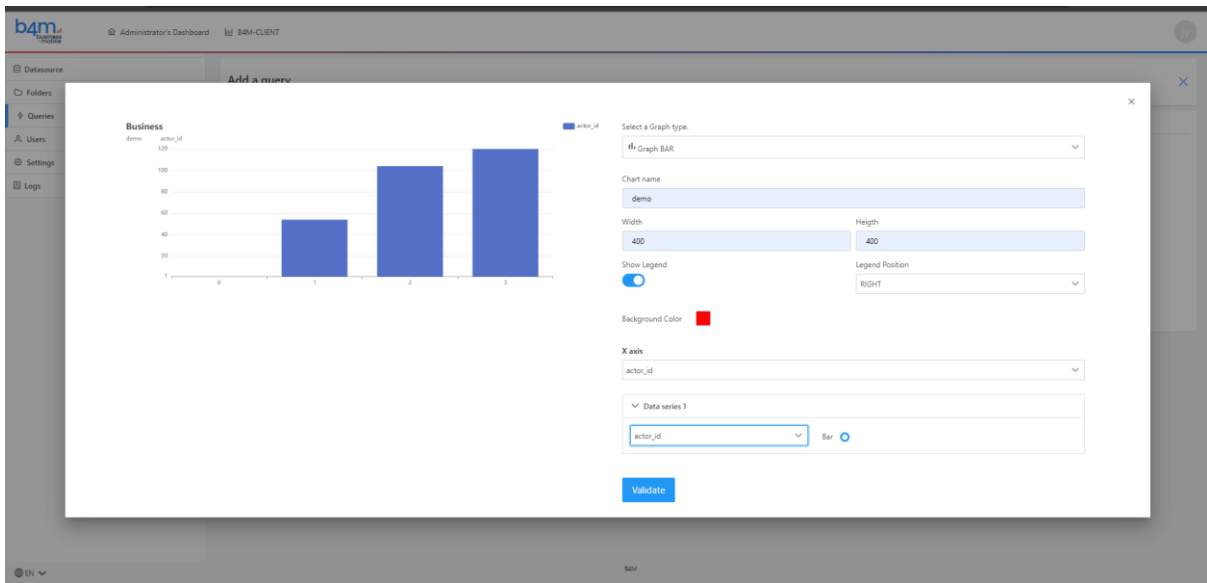


Image 41: Add Query Last Step - Add Graph.

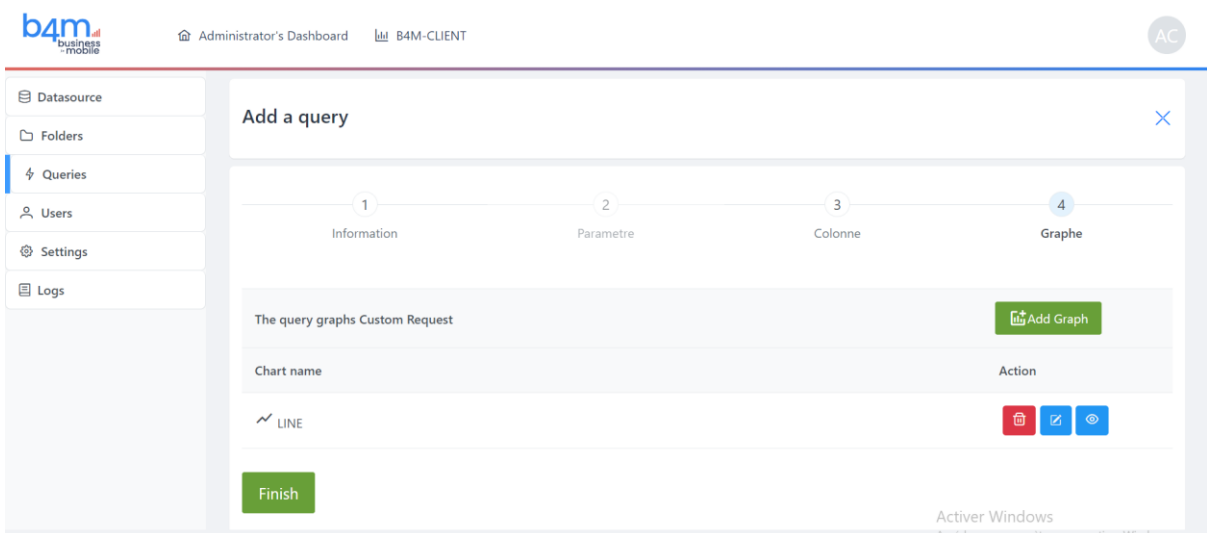


Image 42: Add Query Last Step - After adding a graph.

After the creation of the request, the user is redirected to the same request in modification.

3.4.2 Modify query

The edit page of a request loads the information about a request. The page is organized in tabs and there are four of them. As the creation of a request is divided into steps, on the modification of a request each tab plays the role of a step. Below the tabs, there are three buttons that allow you to:

- save the changes and redirect the user to the home page of the requests.
- save the changes and stay on the same page.
- execute the request and preview the result on a window.

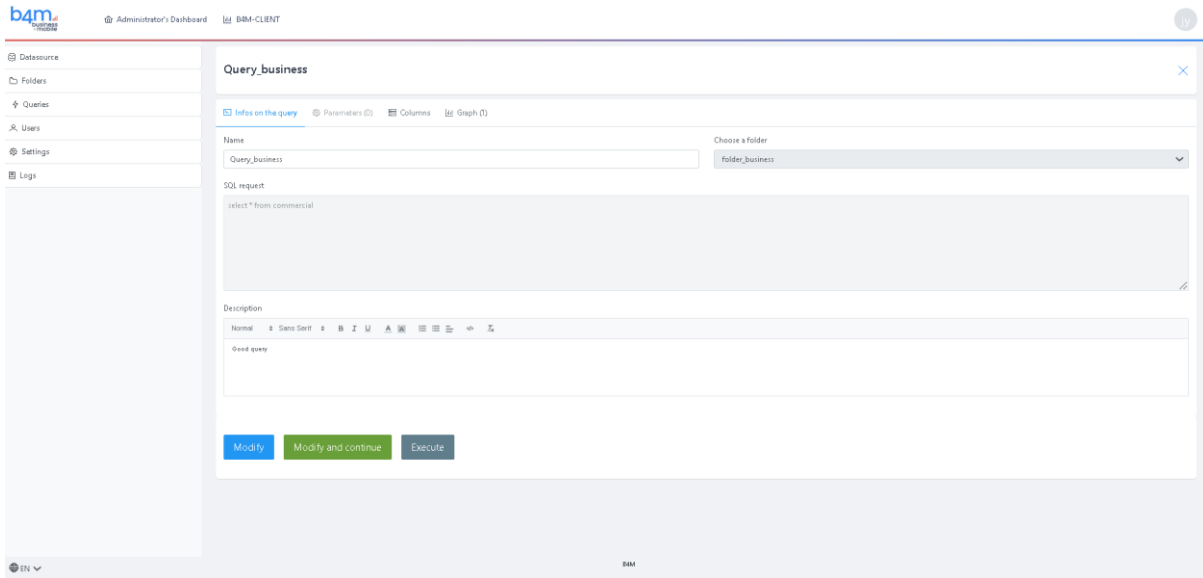


Image 43: Modify a query, Page.

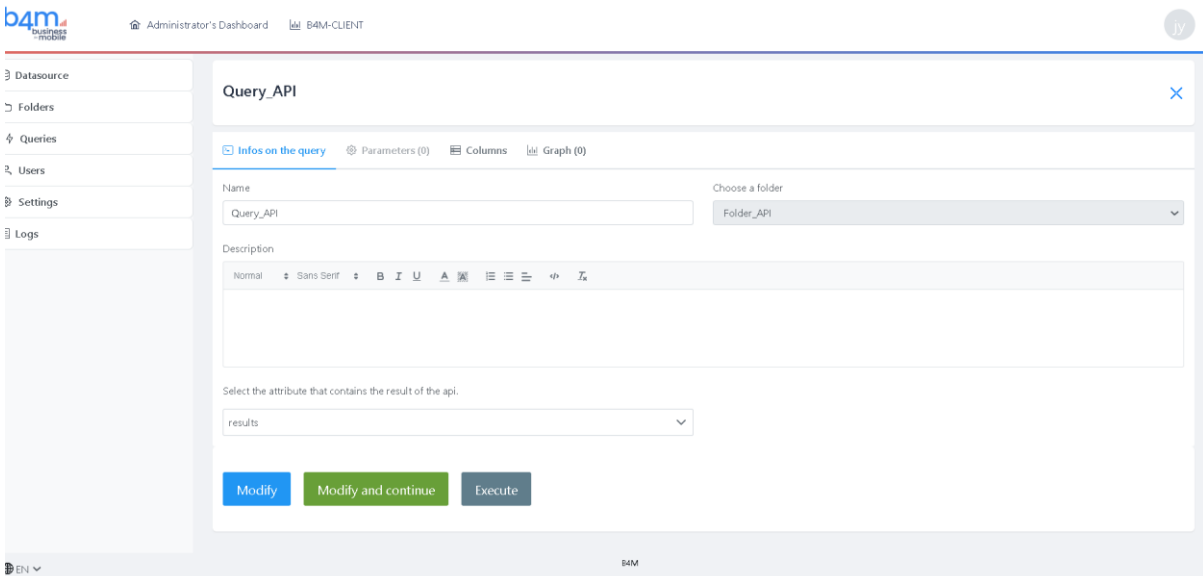


Image 44: Modify a query, API Page.

3.4.3 Delete Query

To delete a query, the user goes to the queries home page, targets the row of the query to be deleted and clicks on the delete button which is coloured red. After clicking the button, a confirmation window appears to confirm the deletion. After confirmation, a notification is presented to indicate whether the deletion was successful or not.

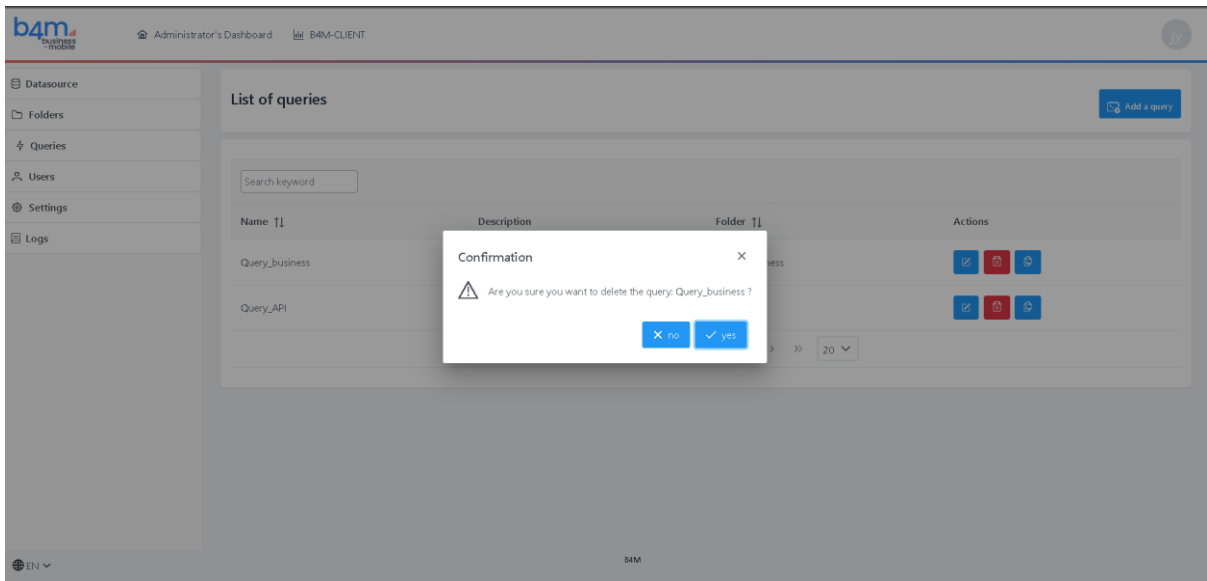


Image 45: Delete a query, Page.

3.4.4 Clone Query

Cloning a query means reproducing a non-API query and modifying its content. During the cloning it is not possible to modify the folder of the query.

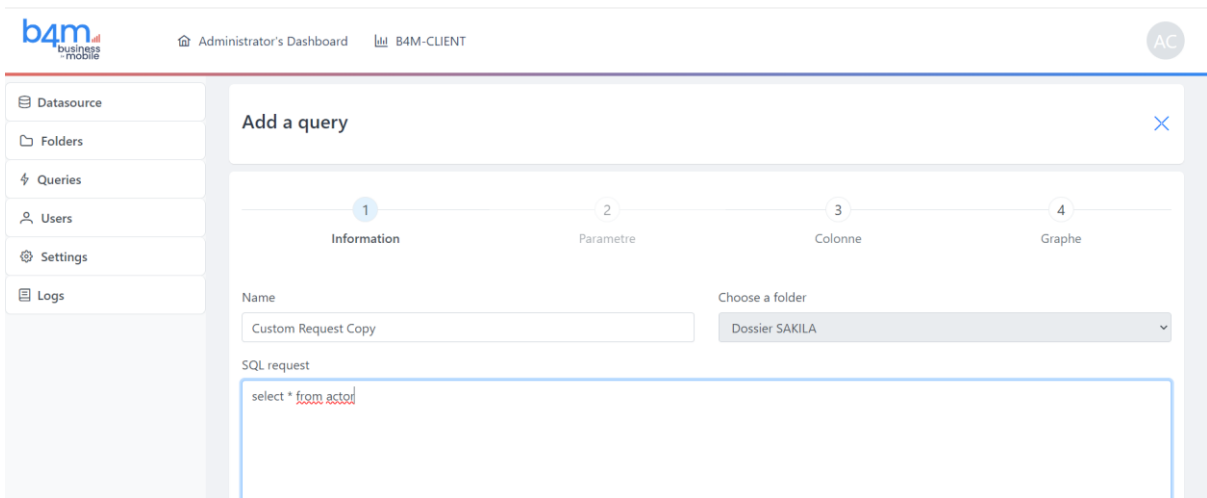


Image 46: Clone a Query.

3.5 Users

Users represent the people who need access to B4M. Users have a home page with an add user button, below this button there is a table containing all users. Users can be sorted, filtered and are organized by page. On each row of the table, there is a button that allows you to activate or deactivate a user, another button that allows you to modify the information of a user and a last button that allows you to delete a user.

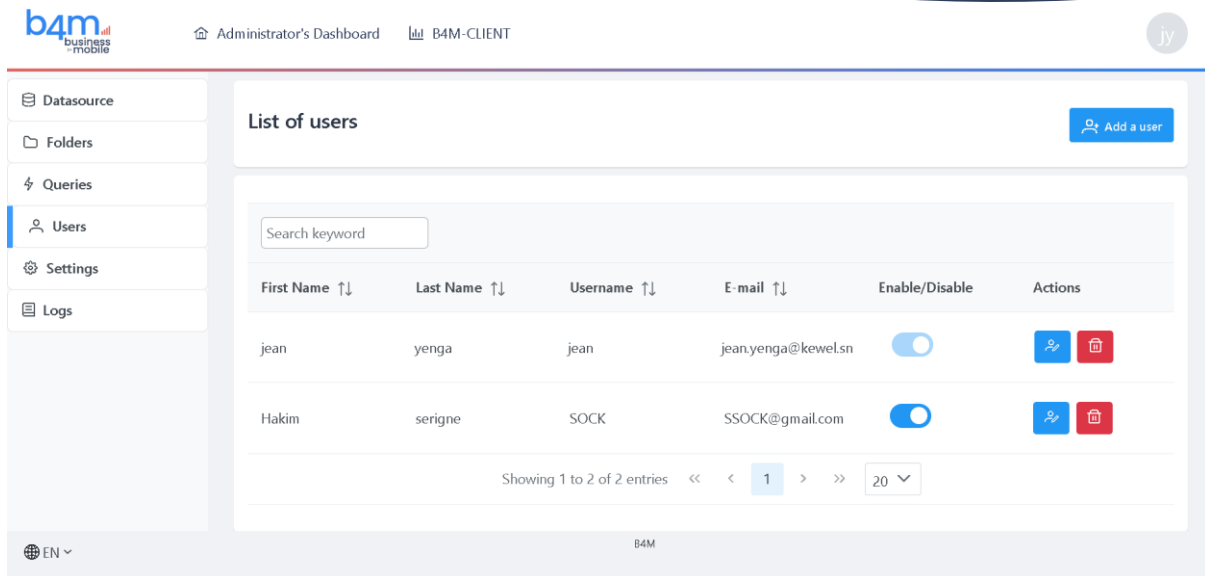


Image 47: List of users Page.

3.5.1 Add user

The page for adding a user consists of a form where the administrator will define the username, email address, first name, last name, password, and password confirmation. Below the form, there are two buttons, one of which allows to save the information and redirect the administrator to the homepage of the users. And another button that allows to save the information and stay on the same page by resetting the form fields.

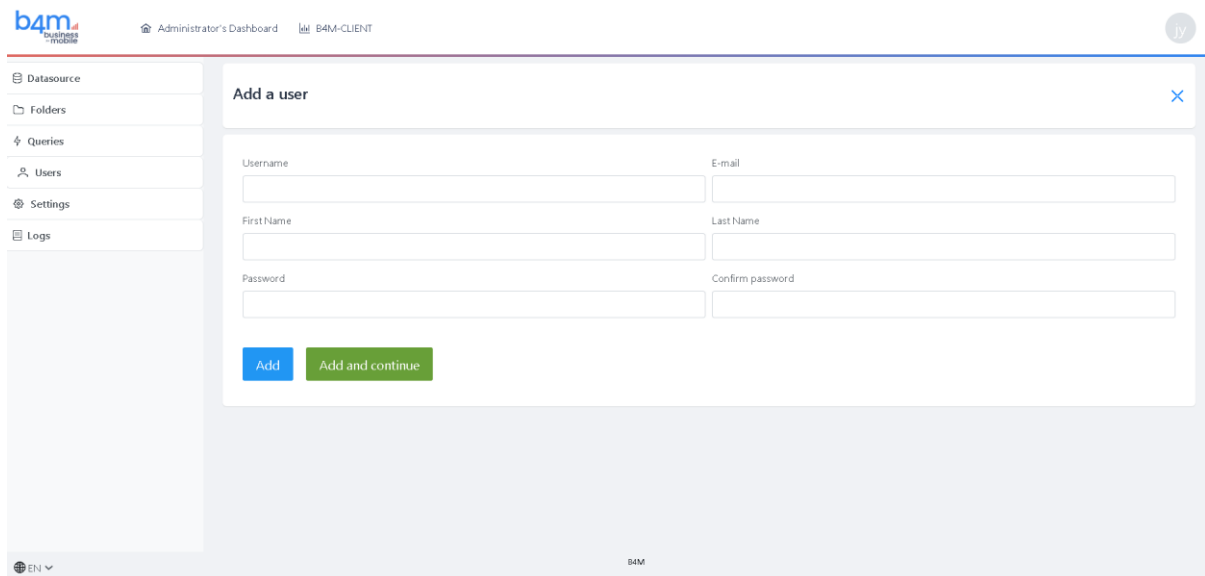


Image 48: Add user Page.

3.5.2 Modify user

The edit user page loads information about a user, which is divided into three tabs. On the first tab, a form that contains the user's name, which cannot be changed, email address, first name and last name. On the second tab, the administrator can select the roles that should be

assigned to the user via a drop-down list. On the third tab, the administrator has the option to select the folders that should be assigned to the user via a drop-down list. Below the tabs, there are three buttons to save the changes and go to the user's home page, save, and stay on the same page or reset the user's password. Clicking the reset password button displays a form on the screen that allows the administrator to reset the password.

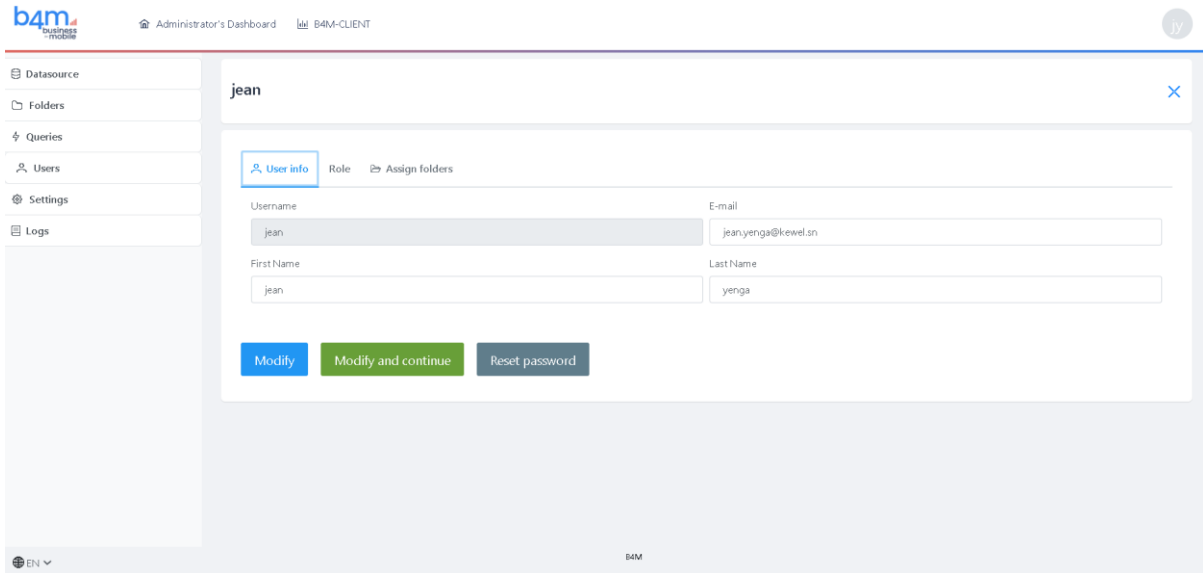


Image 49 : Modify user Page.

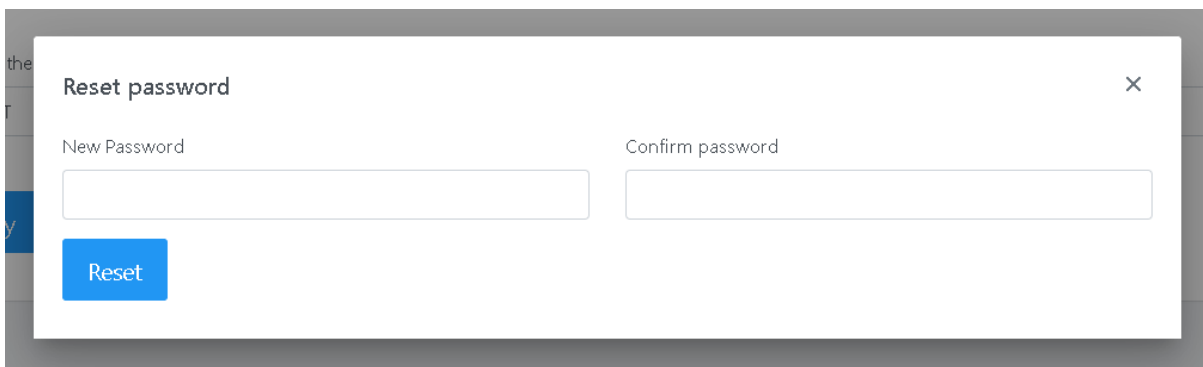


Image 50 : Reset password Page.

3.5.3 Delete or disable user

To delete a user, the admin goes to the users' home page, targets the line of the user to be deleted and clicks on the red delete button. After the click, a confirmation window appears to confirm the deletion. After confirmation, a notification is displayed on the screen to indicate whether the deletion was successful or not.

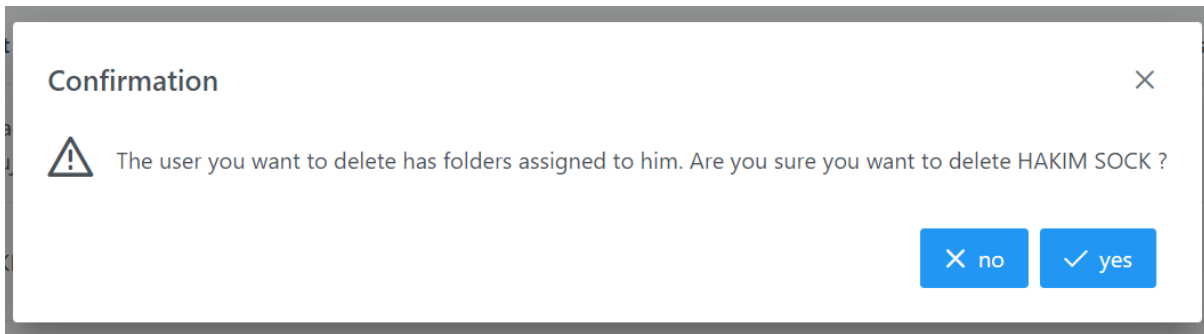


Image 50: Pop-up deleting a user.

To deactivate or activate a user, the admin goes to the users table, targets the line of the user to be deleted and clicks on the button contained in the Enable/Disable column of the table. After the click, the colour of the line becomes grey for a deactivated user and white for an activated user.

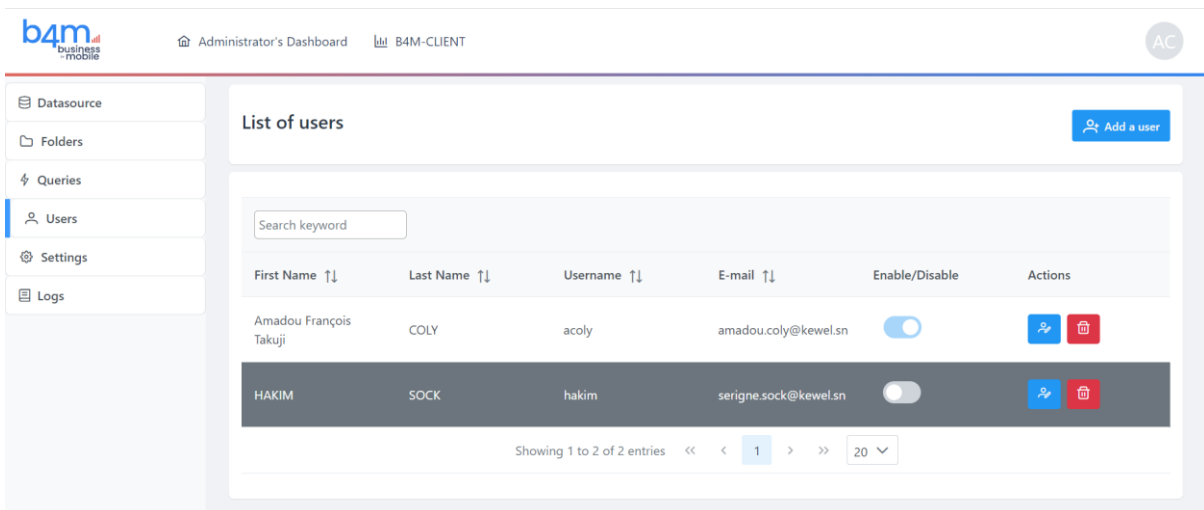


Image 51: Homepage of users after disabling user.

3.6 Settings

The settings in B4M represent the part where the user updates the information of the client that the application, the configuration of the mail server and the configuration of the information to be displayed on the dashboard. The page is divided into three tabs: on the first tab there is the client information that the user can modify. On the second tab, there is the mail server information and on the third tab there is the B4M-CLIENT dashboard information. Below each college, there is a button to save the changes made on each tab.

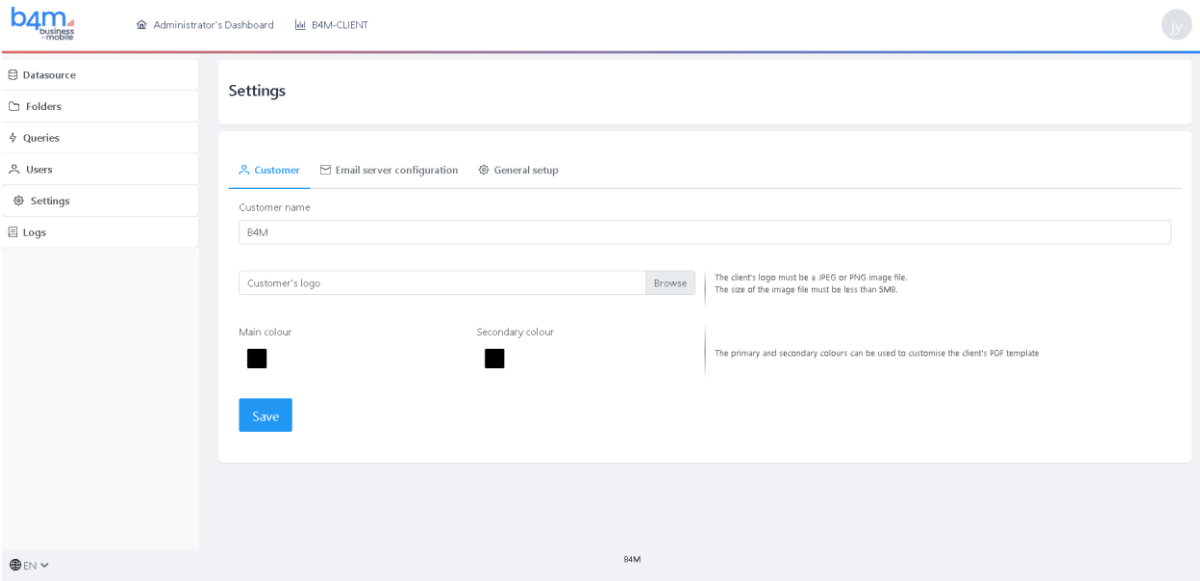


Image 52: Settings Page Customer Tab.

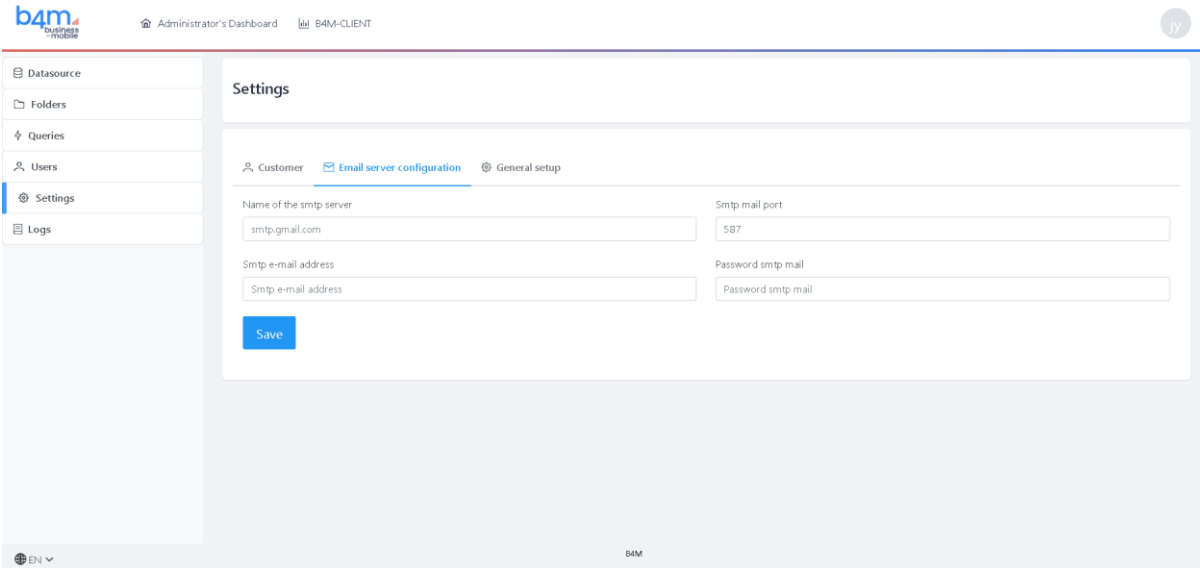


Image 53: Settings Page Email Server Configuration Tab.

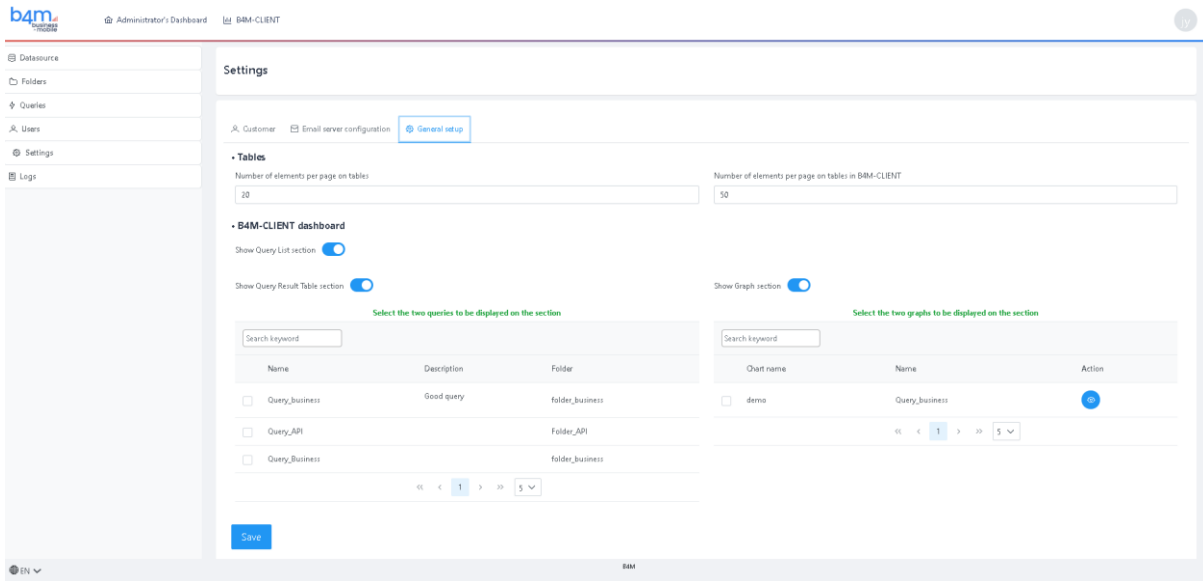


Image 54: Settings Page General Setup Tab.

3.7 Logs

Logging is a part that is only visible to super administrators. It allows traceability on the users who connect to B4M, the management of the users and the execution of the requests.

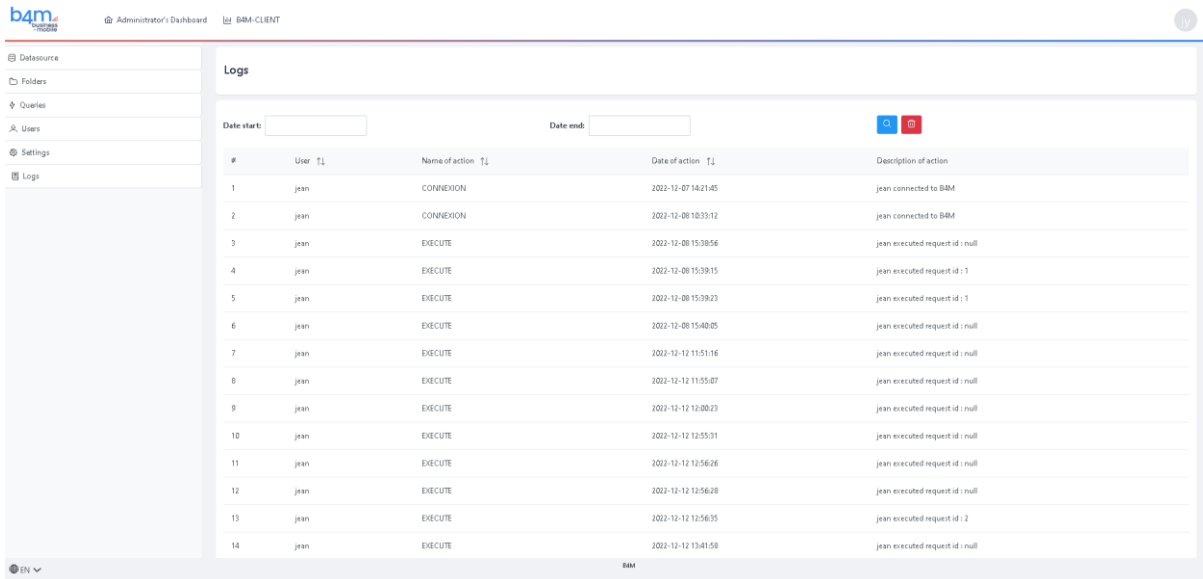


Image 55: Logs Page

4 B4M CLIENT

4.1 Presentation

B4M-CLIENT is the part of B4M where the user has the possibility to execute queries and display the results of these queries on tables. The B4M-CLIENT menu is composed of folders containing queries, the user only sees the folders for which he has been assigned.

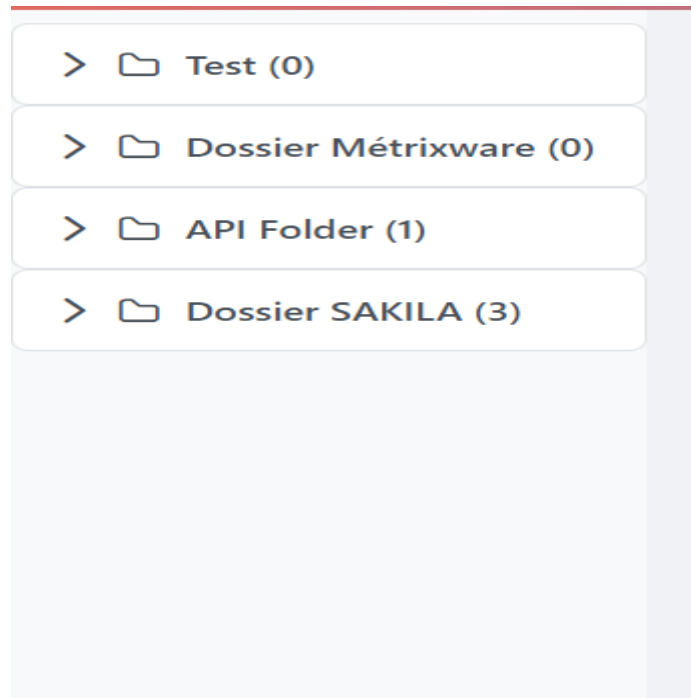


Image 56: Menu of B4M CLIENT.

The dashboard represents the visual display of information allowing to know the number of files, requests and graphs attributed to a user.

The dashboard page is composed of:

the statistics section:

which indicates the number of files.

- The number of requests
- The number of graphs
- The graph section which displays the graphs
- The Query Result Table section
- The query list section

The query listings section displays queries by folder. The query list section allows you to search for a query.

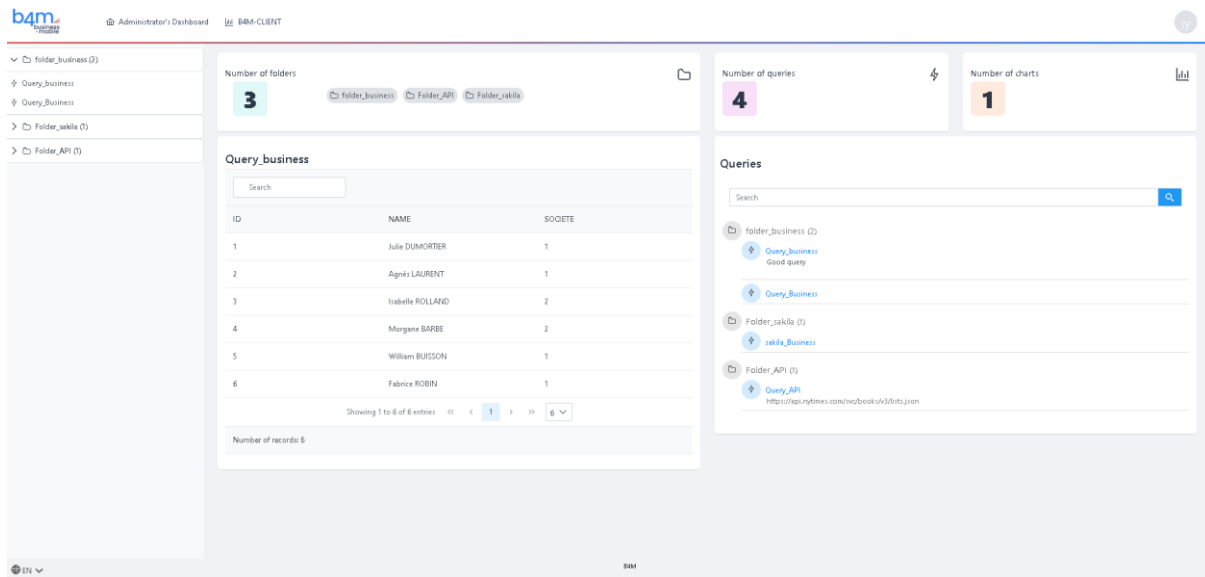


Image 57: B4M client dashboard page.

4.2 Execute Query

On all B4M-CLIENT screens, you can access the B4M-CLIENT menu which lists the requests organized by folder.

Clicking on a query allows you to run it and see the presentation of the results on the query result screen.

The query results presentation screen is made up of two parts:

- 1- Presentation by table: Table of results tab
- 2- Presentation by graph: Graph tab

Table view displays the query result on a table. The table allows to filter on the columns and to sort the columns.

The query results table displays results per page. The default number of items per page is set in the settings.

The presentation by graph (graph tab) displays the list of graphs of the query and the selected graph.

When a graph is selected, it is displayed.

The query result screen allows you to send the result by email (SEND-EMAIL), to download the query result in CSV format (DOWNLOAD-CSV) and by PDF (DOWNLOAD-PDF).

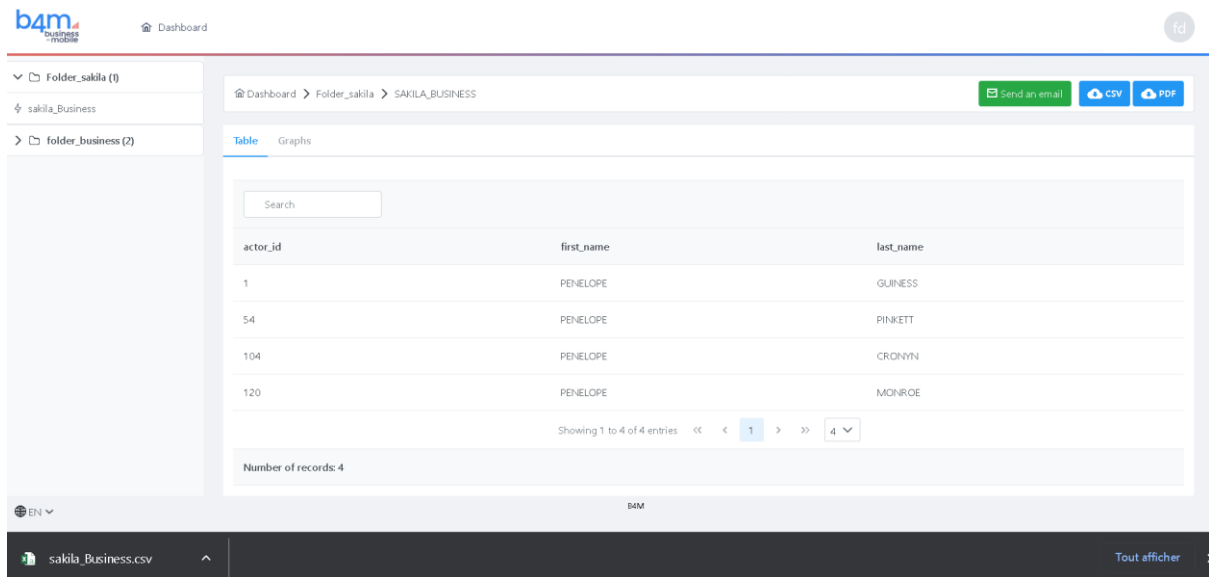


Image 58: Execute Query Page.

4.2.1 SEND-MAIL

The user has access to the send mail button on the query result display screen allowing him to send the query results by email.

The button label is "Send email".

Clicking this button displays a form for sending an email with the following fields:

- 1- Recipients: the people who should receive the document.
- 2- Subject: the subject of the email.
- 3- Message body: Email body.
- 4- File to attach: the type of file to attach (choice to be made between a PDF file or a CSV file).

The user has a "Send" button to send the email to the intended people.

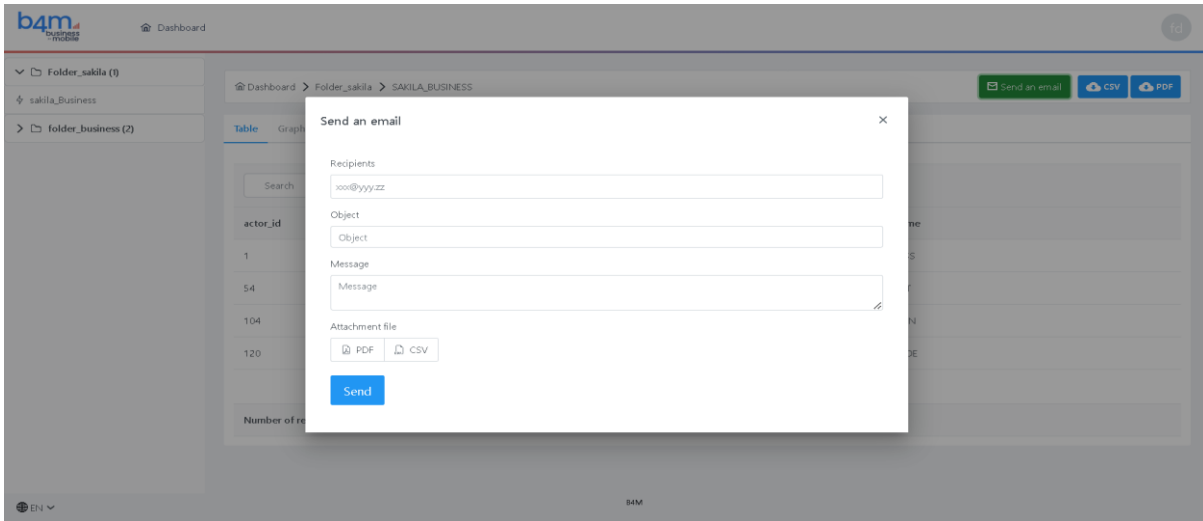


Image 59: Send mail form.

4.2.2 DOWNLOAD-CSV

The user has access to a button “CSV” on the query result display screen allowing him to download the query results to a CSV file.

The button label is “CSV” and a cloud icon with an arrow inside the image precedes the text.

When you click on the button then the file is downloaded with the example below of the request “Sakila_Business”.

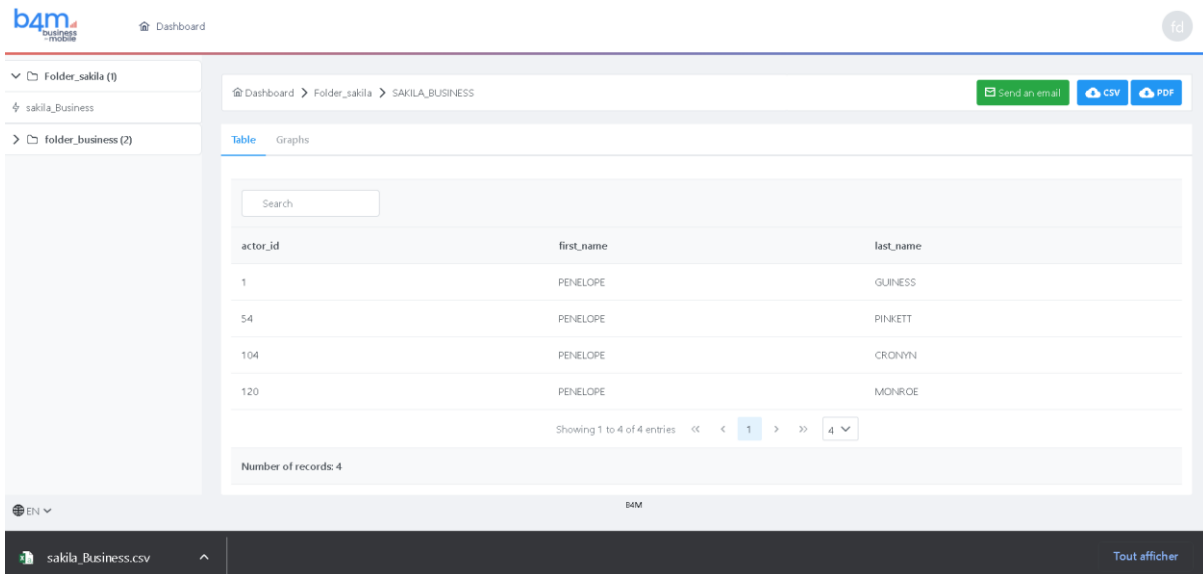


Image 60: Download csv.

4.2.3 DOWNLOAD-PDF

The user has access to the “PDF” button on the query result display screen allowing him to download the query results to a PDF file.

The button label is "PDF" and a cloud icon with an arrow inside the image precedes the text.

When you click on the button then the file is downloaded to the machine according to the example below of the request "Sakila_Business".

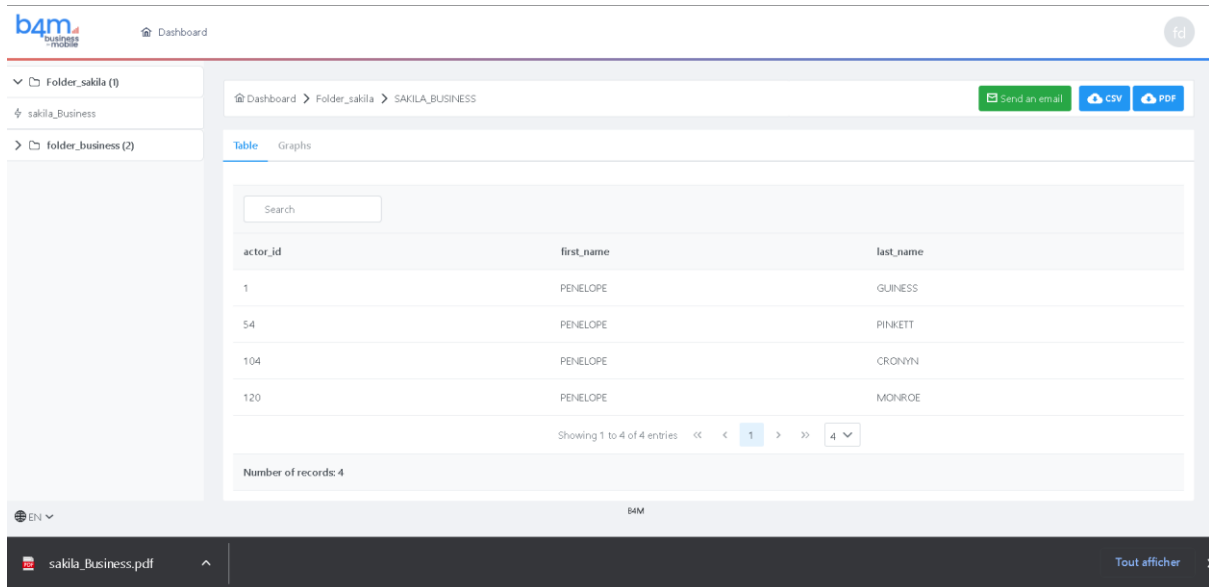


Image 61: Download pdf.

4.3 Settings

B4M-CLIENT-SETTING represents the part where the user can choose the content that should be displayed on his Dashboard.

By clicking on the profile icon in the navigation bar of the application, a drop-down menu opens with the option Setting.

By clicking on the Parameter option, the user views the parameters screen with the following sections:

- 1- Display or not the graphic section.
- 2- Whether or not to display the queries list section.
- 3- Whether or not to display the Table section of the query results.
- 4- Select queries to display in the query results table section.
- 5- Select the graphs to display in the graph section.

A "Save" button is offered to the user to save his settings.

Settings

General setup

Dashboard

Show Query List section

Show Query Result Table section

Show Graph section

Select the two queries to be displayed on the section

| Name | Description | Folder |
|---|-------------|--------|
| <input type="text" value="Search keyword"/> | | |
| | | |
| | | |

Select the two graphs to be displayed on the section

| Chart name | Name | Action |
|---|------|--------|
| <input type="text" value="Search keyword"/> | | |
| | | |
| | | |

Save

Image 62: Settings dashboard client.