



# How to Guide

## Create a Data Set

Version: Release 3.0

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# 1. Document Purpose

The purpose of this document is to guide users on how to create data sets using the BDB Platform. It is recommended that users follow the step by step process given below.

# 2. Pre-requisites

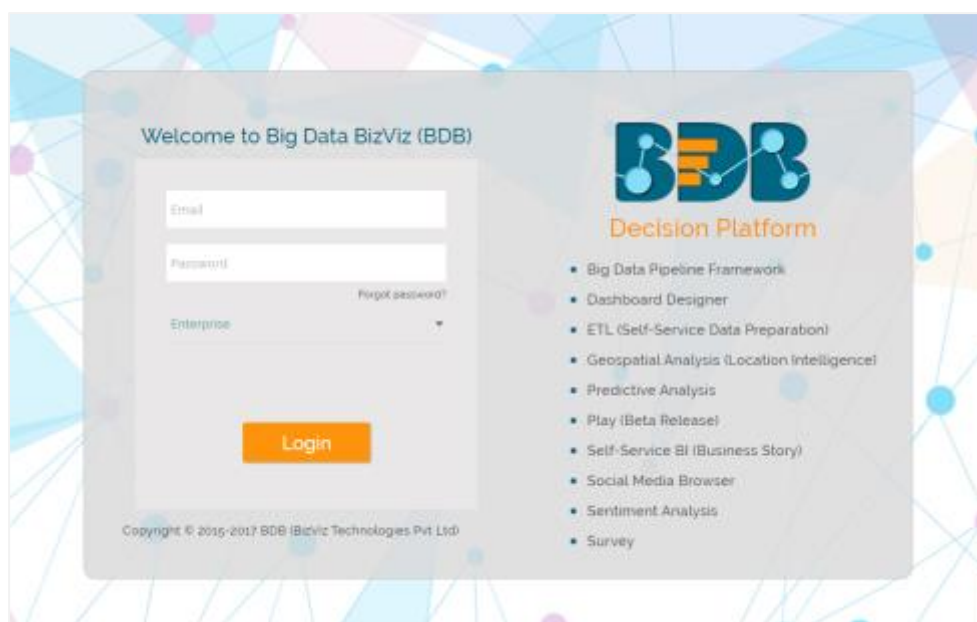
- o Browser that supports HTML5
- o Operating System: Windows 7
- o Basic understanding of the BizViz Server

# 3. Step-by-Step Process

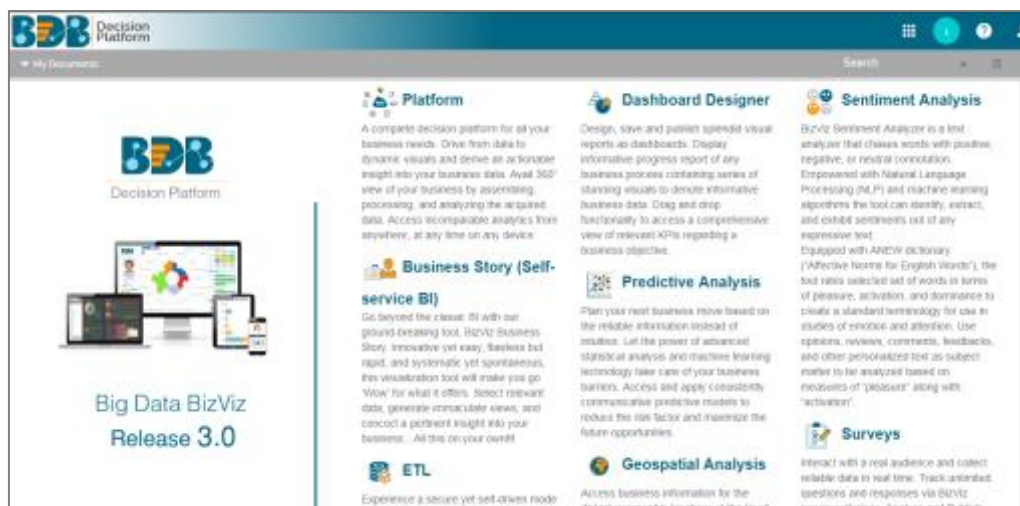
## 3.1. Accessing the BDB Platform

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



- i) Open BDB Enterprise Platform Link: <http://apps.bdbbizviz.com/app/>
- ii) Enter your credentials to log in.
- iii) Click 'Login'

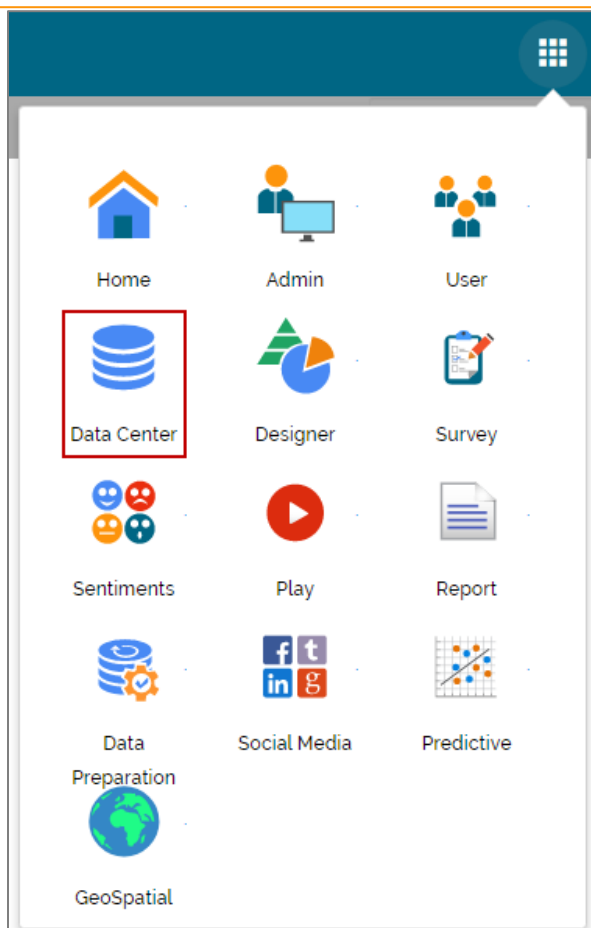


- iv) Users will be redirected to the BDB Platform home page.

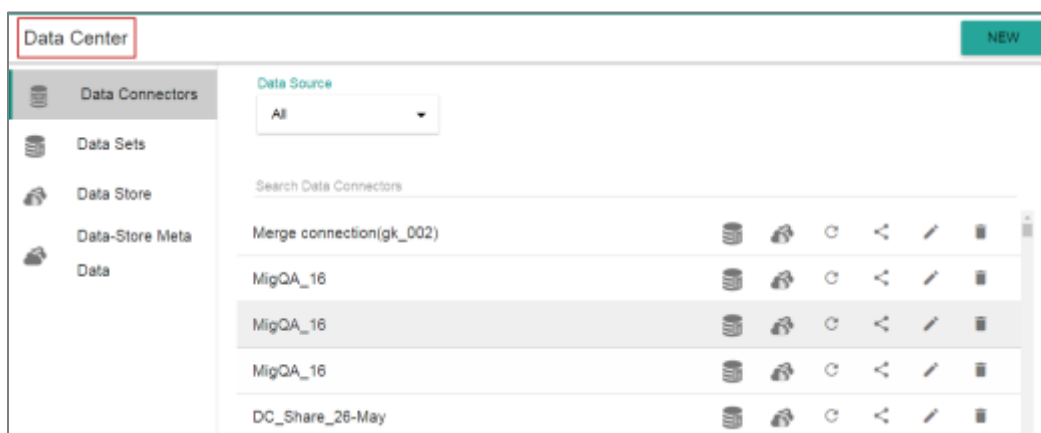


### 3.2. Creating a Data Set

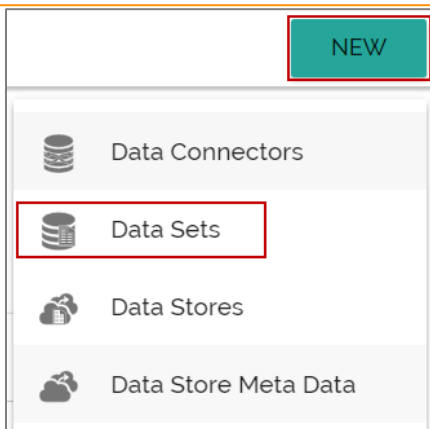
- i) Click the 'Apps' icon  on the platform menu bar.
- ii) All the available plugin applications will be displayed.
- iii) Click the 'Data Center' option  from the apps menu.



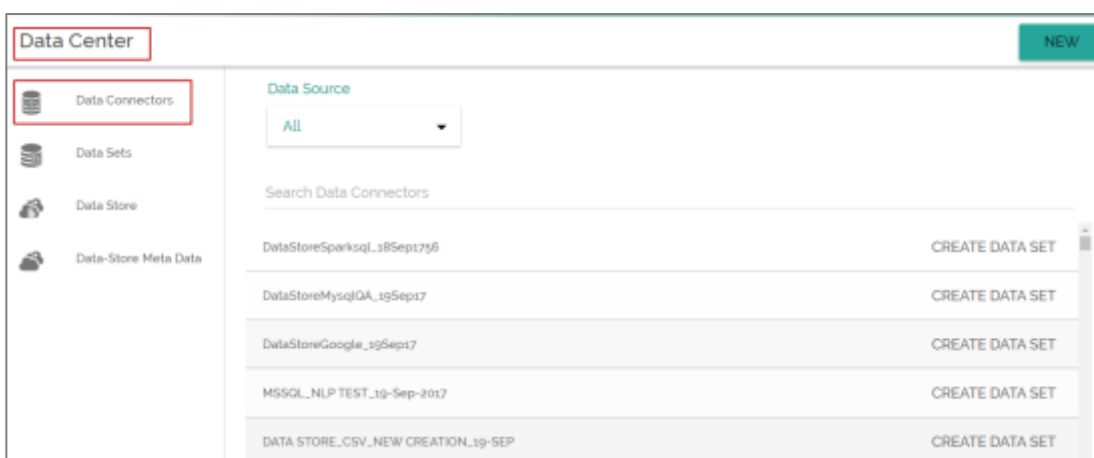
iv) Users will be directed to the Data Center landing page.



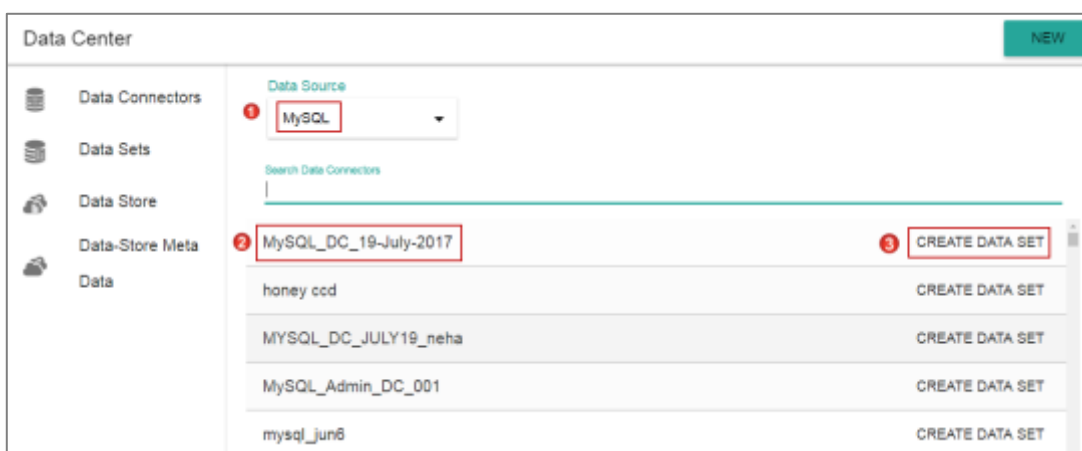
- v) Click 'NEW'
- vi) A context menu opens.
- vii) Select 'Data Sets' from the context menu.



i) Users will be directed to the following page.



- ii) Select a Connector Type from the 'Data Source' filter.
- iii) Select a data connector from the 'Data Connector' list.
- iv) Click the 'CREATE DATA SET' option provided next to the selected data connector.



- v) Users will be directed to the 'Data Set' form.
- vi) Fill in the following details:
  - a. **Service Name:** Enter any user defined name for the new data set.
  - b. **Description:** Brief description about data set (It is an optional field).
  - c. **Data Connector Name:** This option will be pre-defined.
  - d. **Data Base Name:** This option will be pre-defined.

Service Name \*  
**MySQL Data Set**

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Description

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Data Connector Name  
 MySQL\_DC\_19-July-2017

---

Database Name  
 GK\_TESTDB

e. **Query:** Write query in the given space (Use 'Ctrl+Space' for assistance in writing a query).

Query

```
1 Select * from OUTLET_DETAILS
```

\*Use Ctrl+Space for assistance

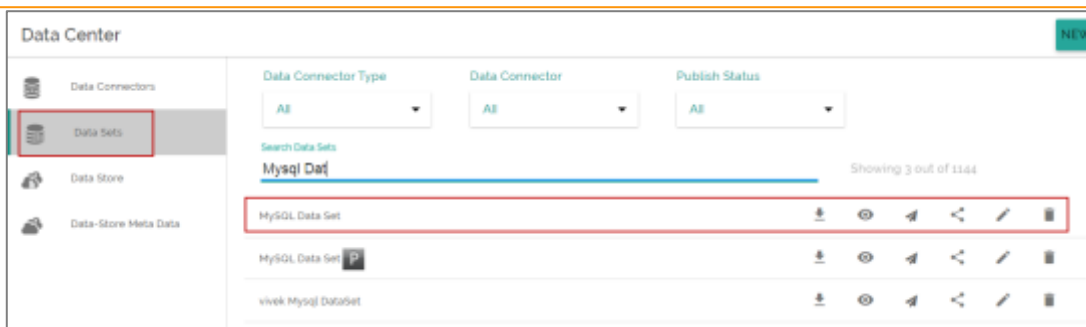
CANCEL PREVIEW SAVE

vii) Click 'Preview' to display the preview result of the new data set.

COMP_ID	COMP_NAME	OUTLET_NAME	CITY_NAME	TOTAL_INCOME	PROFIT	LOSS	SALE_DATE	UPLOAD_DATE	TOTAL_QTY
BT190802	BATA	BATA SHOES	BANGALORE	230000	90000	0	2001-10-01	2001-09-12	240
SL908700	SREE LEATHER	SREE LEATHERS	PATNA	10000	4500	5600	2001-10-05	2009-12-20	980
RLD9870	RELIANCE	RELIANCE DIGITAL	BANGALORE	9800	2300	78000	2001-10-08	2007-12-13	800
ADE890	ADISHWAR	ADISHWAR	BANGALORE	9000	5600	1200	2001-10-13	2015-09-09	600

viii) Click 'Save'

ix) A new data set will be created and added to the list of data sets.



Option	Name	Task
	Download	Download the data set.
	View Link	View the data set link.
	Publish	Publish a data set.
	Share Data Service	Share a data set to/for the selected user(s) or group(s). or Exclude the selected users.
	Edit	Edit the data set fields.
	Remove	Remove the selected data set from the list.

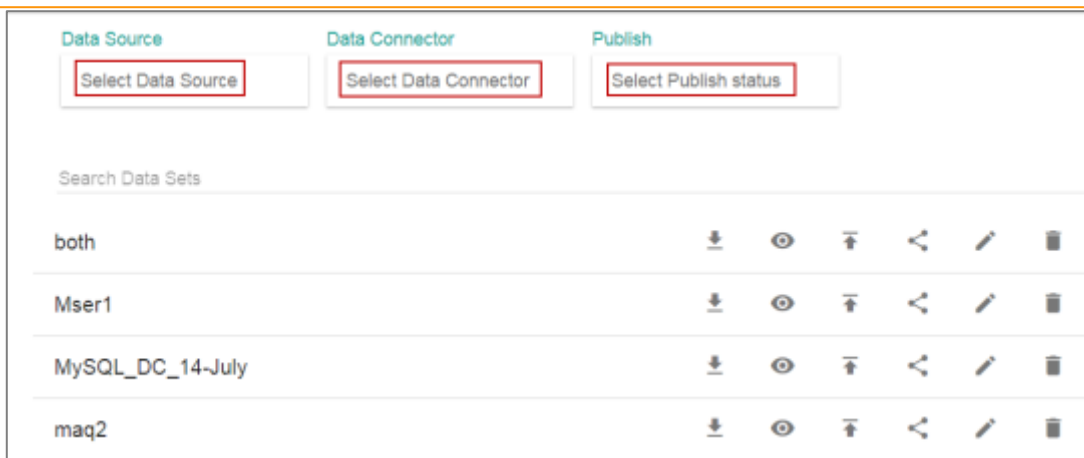
Note:

- Use 'Ctrl+Space' to get help while writing the query.
- Click the 'Help' icon from the Data Set form to get rules to follow while creating a query. The rules to be followed will be displayed in a pop-up screen.



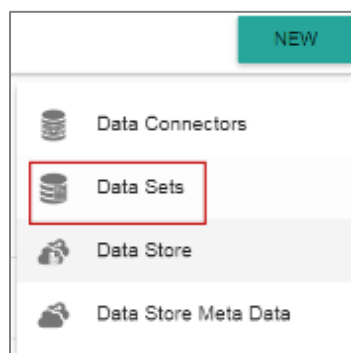
- Users can filter the data set list by Data Source, Data Connector, and Publish status. These filters are provided on the top of the Data Set List page.



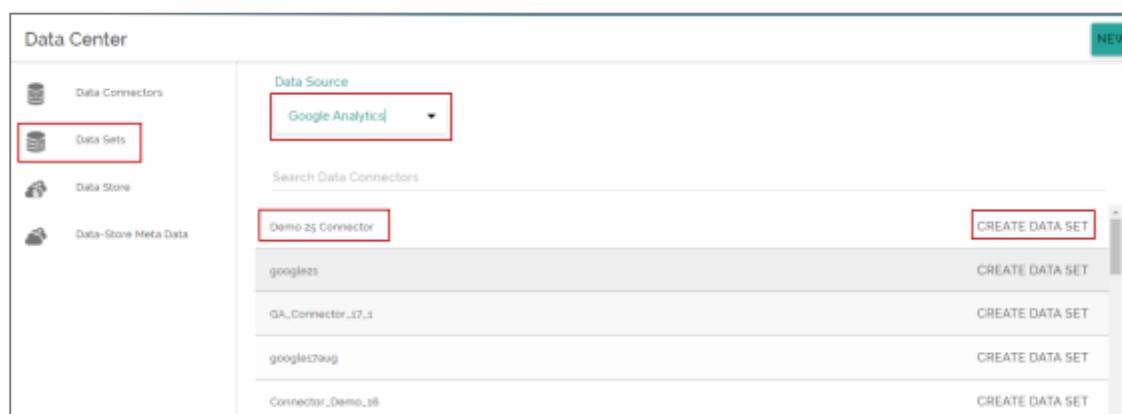


### 3.2.1. Google Analytics Data Set

- i) Navigate to Data Center page.
- ii) Click 'NEW' and select 'Data Set' from the context menu.



- iii) Users will be redirected to the page containing all the data connectors.
- iv) Select 'Google Analytics' via the 'Data Source' filter.
- v) Select a Google Analytics data connector from the displayed list and click 'CREATE DATA SET'.



- vi) Users will be redirected to a new Data Set form for Google Analytics Data Set.
- vii) Fill in the following information:
  - a. Service Name: Enter any user defined name for the new data set.
  - b. Description: Brief description about data set. (It is an optional field).
  - c. Data Connector Name: This option will be pre-defined.
  - d. Account: This option will be pre-defined based on the selected google account.

Data Set

**Dataset Name \***

Sample Google Analytics Data Set

---

**Description**

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**Data Connector Name**

Demo 25 Connector

**Account:**

businessdataintelligence@gmail.com

- e. Data Selection: Select data using the below given drop-down lists.
  - i. Web Properties: Select the required web properties using the drop-down menu.
  - ii. Select a View: Select the required view using the drop-down menu.
  - iii. Dimensions: Select the required dimensions using the drop-down menu. The selected dimensions will be displayed below with 'ga' suffix.
  - iv. Metrics: Select the required metrics using the drop-down menu. The selected metrics will be displayed below with 'ga' suffix.

**Data Selection**

BdBizViz UA-22551973-4

All Web Site Data

**Dimensions**

User Type, Browser, Operating System

**Selected Dimensions** ga:operatingSystem ga:browser ga:userType

**Metrics \***

Users

**Selected Metrics** ga:users

- f. Apply Filter: Enable the filter option. The filter query will be displayed below.
- g. Time Range: Define a time range selecting 'From' and 'To' dates.
- viii) Click 'PREVIEW DATA'

**Apply Filters:**

**filter query \***

ga:browser==Firefox

**Time Range**

From date: 8/1/2017 To date: 8/25/2017

- ix) The data preview will be displayed below in the tabular format.
- x) The **Save** option will be enabled.
- xi) Click **Save**.

ga:operatingSystem	ga:browser	ga:userType	ga:users
Android	Firefox	New Visitor	2
Android	Firefox	Returning Visitor	1
Linux	Firefox	New Visitor	12
Linux	Firefox	Returning Visitor	1
Macintosh	Firefox	New Visitor	1
Windows	Firefox	New Visitor	38
Windows	Firefox	Returning Visitor	6

- xii) Users will be directed to the data set list.
- xiii) The newly created Google Analytics dataset will be added to the list.

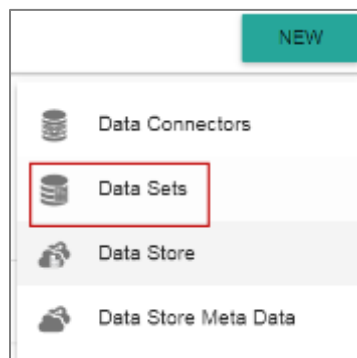
Data Connector Type	Data Connector	Publish Status
Google Analytics	All	All

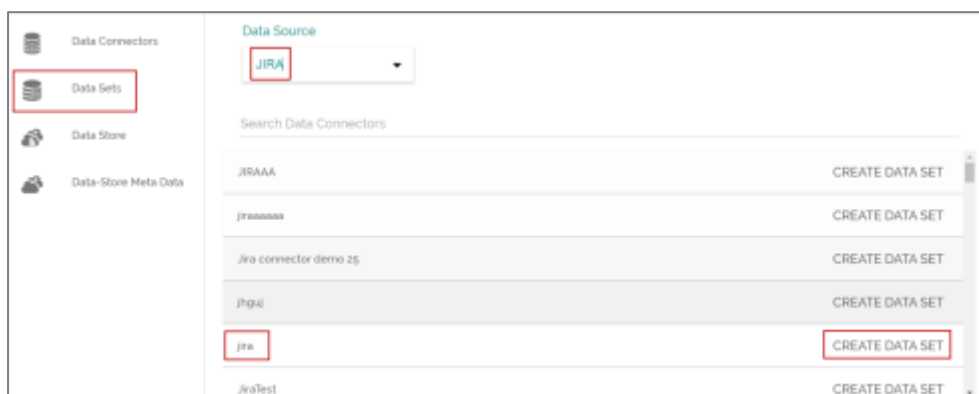
Search Data Sets	Showing 107 out of 107
DataSet demo 258 P	[Icons]
google23 P	[Icons]
<b>Sample Google Analytics Data</b>	[Icons]
rak_google_api	[Icons]

### 3.2.2. Jira Data Set

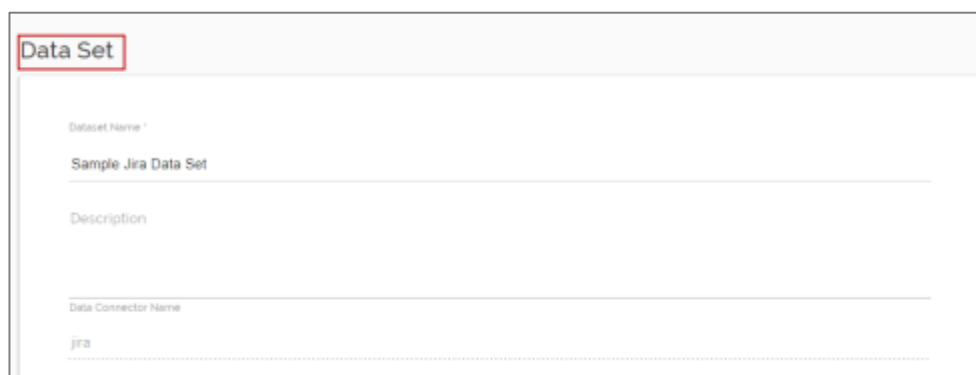
- i) Navigate to Data Center page.
- ii) Click **New** option and select Data Set from the context menu.



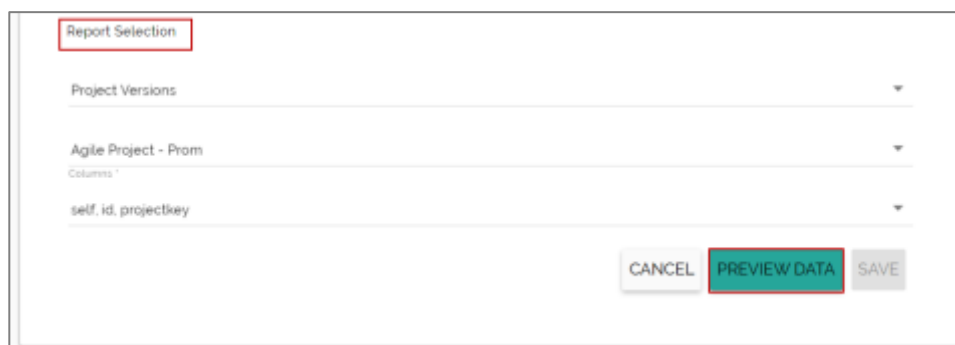
- iii) Users will be redirected to the page containing all the data connectors.
- iv) Select **JIRA** via the **Data Source** filter.
- v) Select a JIRA data connector from the displayed list and click **CREATE DATASET**



- vi) Users will be directed to a new DataSet form for JIRA data set.
  - a. Enter any user-defined name for the new data set.
  - b. Description: Brief description about data set. (It is an optional field).
  - c. Data Connector Name: This option will be predefined (the selected data connector name will appear).
- vii) Fill in the following information:
  - a. Service Name: Enter any user defined name for the new data set.
  - b. Description: Brief description about data set. (It is an optional field).
  - c. Data Connector Name: This option will be predefined (the selected data connector name will appear).



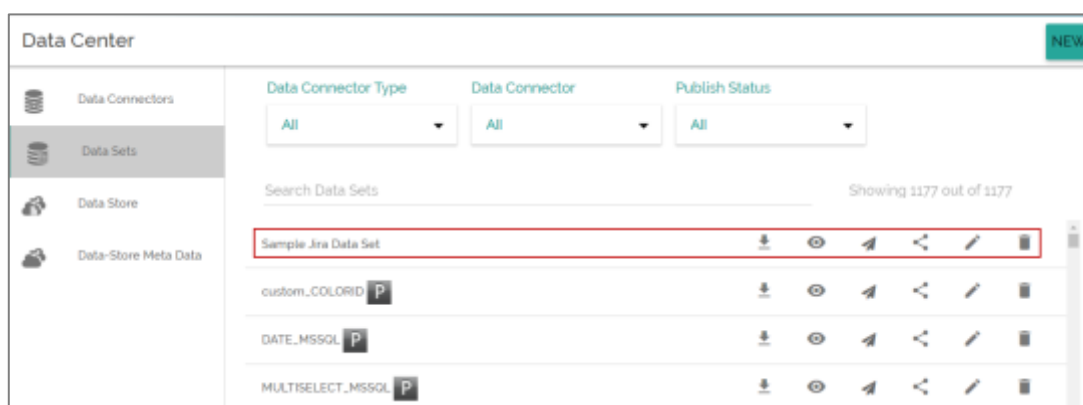
- d. Report Selection
  - i. Report Type: Select a report type using the drop-down menu.
  - ii. Sub-Report Type: Select a sub-report type using the drop-down menu (If the selected report type does not have a sub-report type, then this field may not appear in the form).
  - iii. Columns: Select the required columns from the drop-down menu. The selected column names will be mentioned in the form.
- viii) Click 'PREVIEW DATA'



- ix) The data preview will be displayed below in the tabular format.
- x) The **Save** option will be enabled.
- xi) Click **Save**



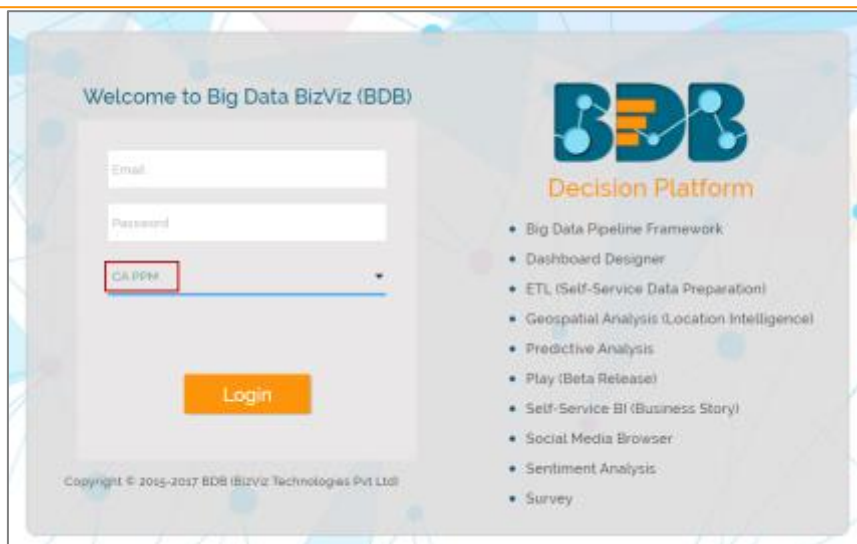
- xii) Users will be directed to the data set list.
- xiii) The newly created Jira data set will be added to the list.



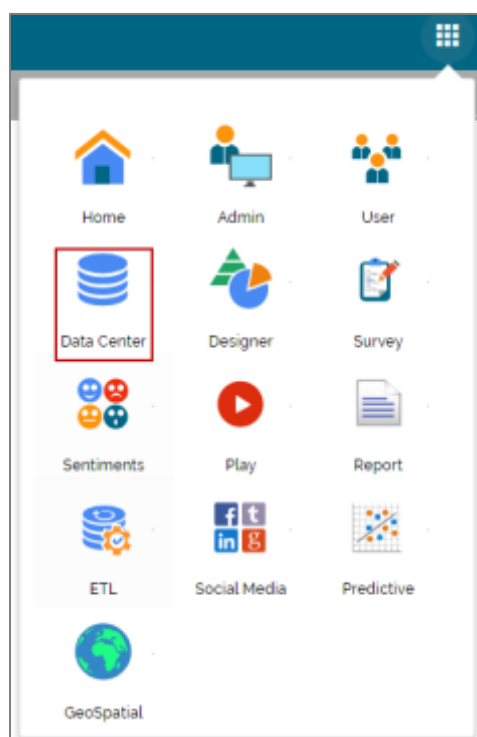
### 3.2.3. CA Data Set

The CA Connector is accessible only for the CA PPM users.

- i) Login to the platform using the CA PPM authentication option.

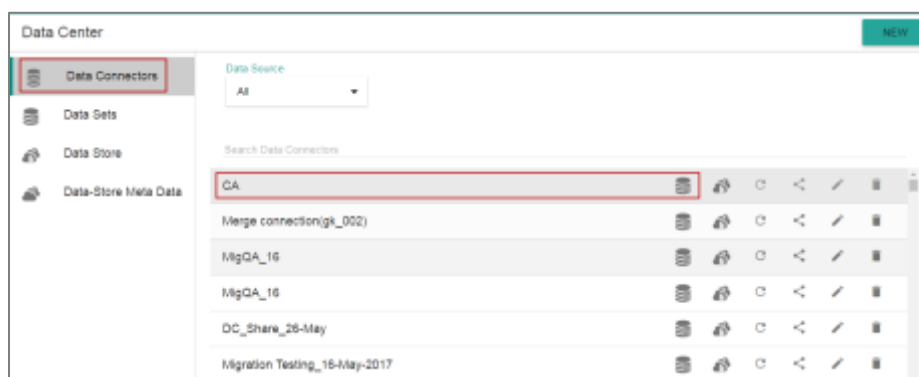



ii) Select Data Center from the Apps menu.

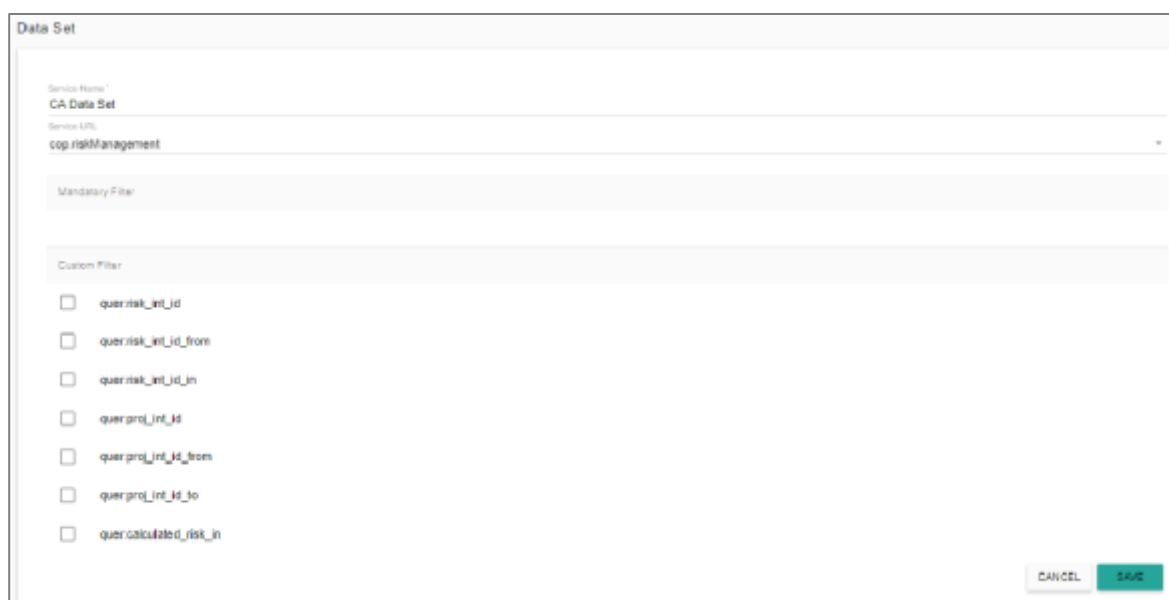


iii) Users will be redirected to the Data Connector list.

iv) The 'CA' default connector will be provided in the data connector list.



- v) Click 'Create New Data Set' option 
- vi) Users will be redirected to the Data Set form.
- vii) Configure the following information to create a data set:
  1. Provide a 'Service Name'.
  2. Select a 'Service URL' from the drop-down menu.
  3. Select a 'Mandatory Filter' from the drop-down menu.
  4. Select a 'Custom Filter' from the drop-down menu.
  5. Click 'SAVE'



viii) A new data set will be added in the data set list.


**Note:**

- a. Users can not access any other option (NEW DATA STORE, Reconnect, Share, Edit, Delete) except 'New Data Set' while using the CA default data connector.
- b. Clicking 'NEW' option on the Data Set form will redirect users to access the 'CREATE DATA SET' option from the Data Connector List.



## 4. Signing Out

Follow the below-given steps to log out from the BizViz Platform.

- i) Click the 'User' icon  on the Platform home page.
- ii) A menu appears with the logged in user details.
- iii) Click 'Sign Out'
- iv) Users will be successfully logged out from the **BizViz Platform**.

**Note:** Clicking on 'Sign Out' will redirect the user back to the 'Login' page of the BizViz platform.