BizViz How-to-Guide

How to use Drilldown feature

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1. Document Purpose

The purpose of this document is to guide users on how to implement drilldown action in dashboards. It is recommended that users follow the step-by-step process given below.

2. Prerequisites

2.1. Software

- Browser that supports HTML5
- Operating System: Windows 7

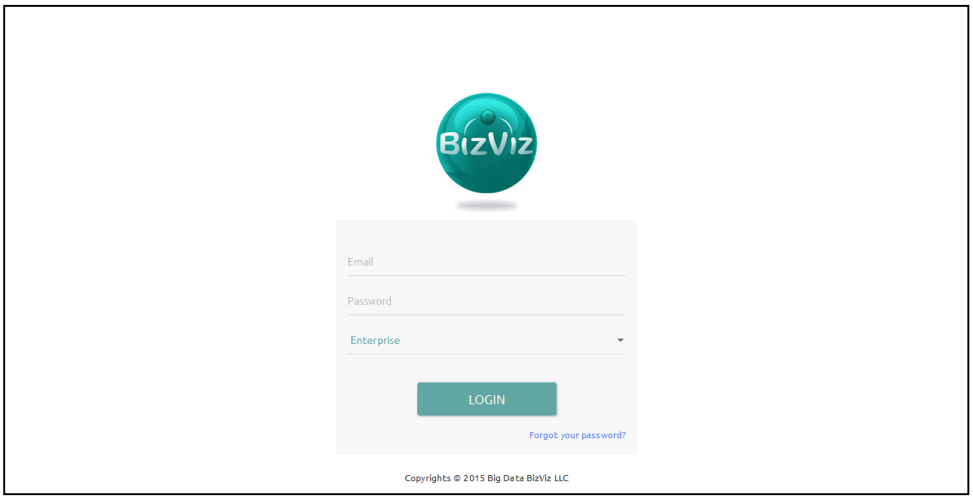
2.2. Basic understanding of the BizViz Server

3. Step-by-Step Process

3.1. Login to the Portal

i) Enter in the URL bar http://www.bdibizviz.com/app/

ii) Enter your credentials to Login



iii) Click on '**Login**' to view the Portal Home Screen

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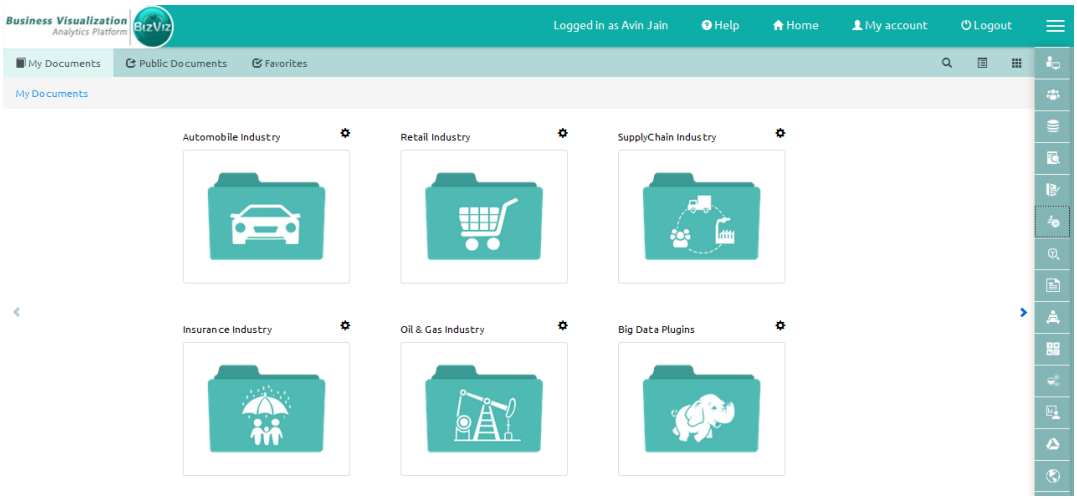
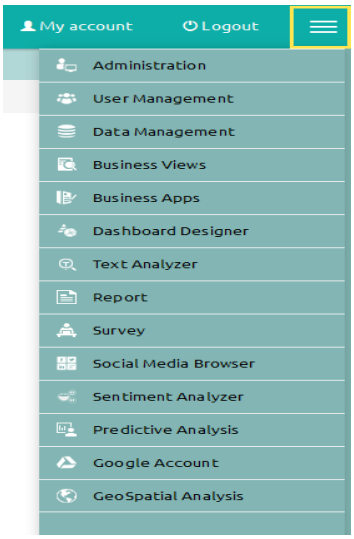


iv) Click on the '**Menu**' button to display the list of the installed apps.



v) Select the '**Dashboard Designer**' plug-in as shown in above to open the Dashboard Designer home page

3.2. Creating Data source Connections for Charts

i) Go to the Dashboard Designer Home Screen, as shown below.
From the Apps drop-down menu, select Dashboard Designer.

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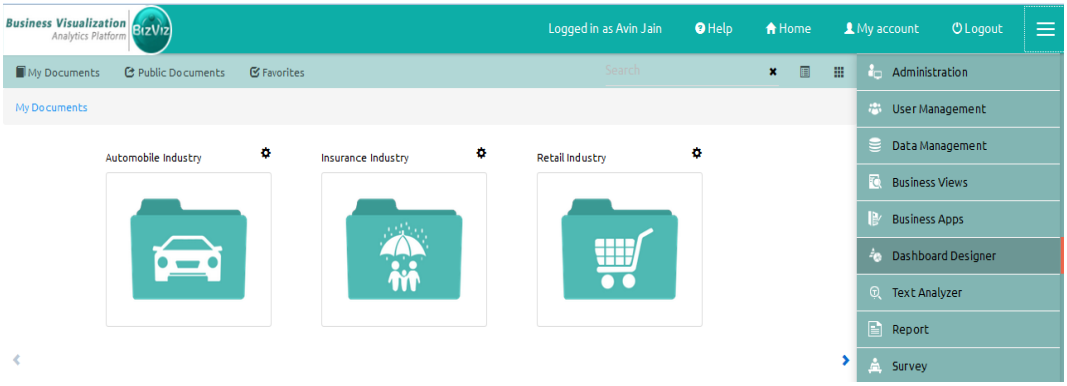
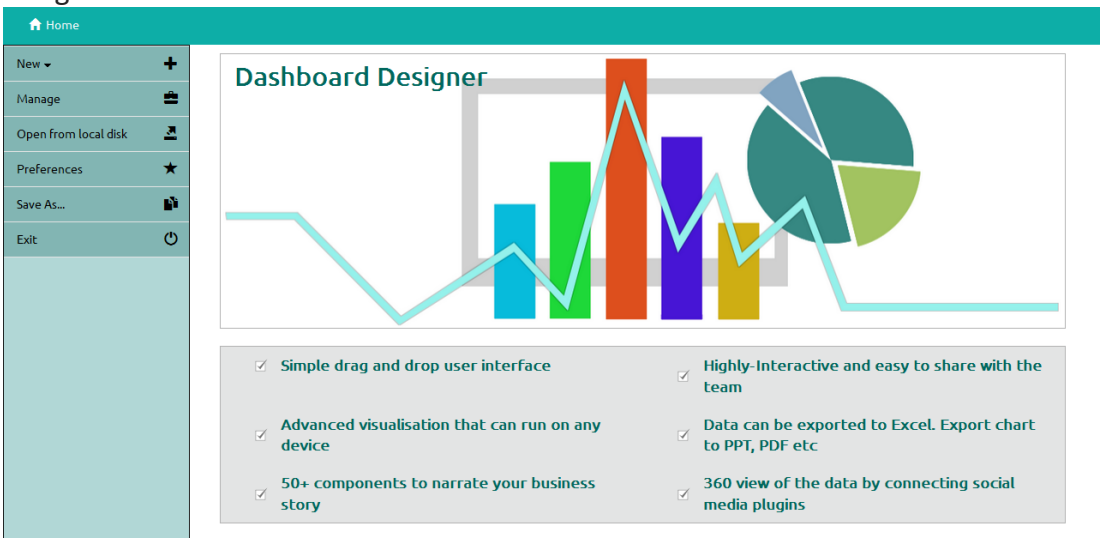


ii) After Selecting '**Dashboard Designer**', you will be directed to the Dashboard Designer home screen.



iii) Click on the '**New +**' drop-down menu. You will be presented with 2 options:

- **Workspace**: A folder that is used to contain dashboards
- **Dashboard**: A canvas used for dashboard design and development

iv) Select '**Dashboard**' to create a new dashboard (as show below)

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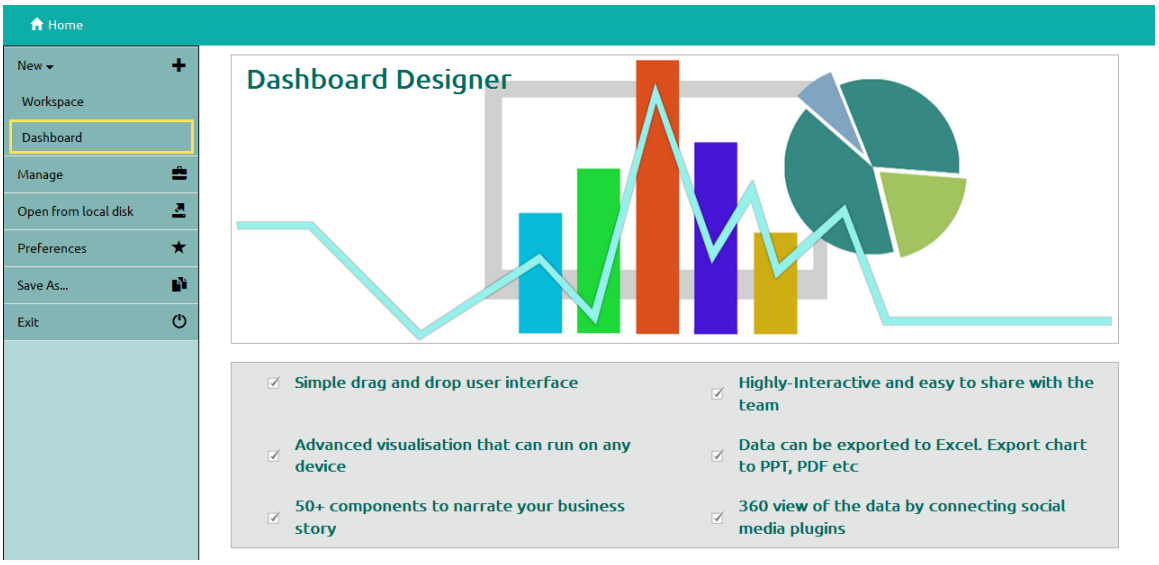
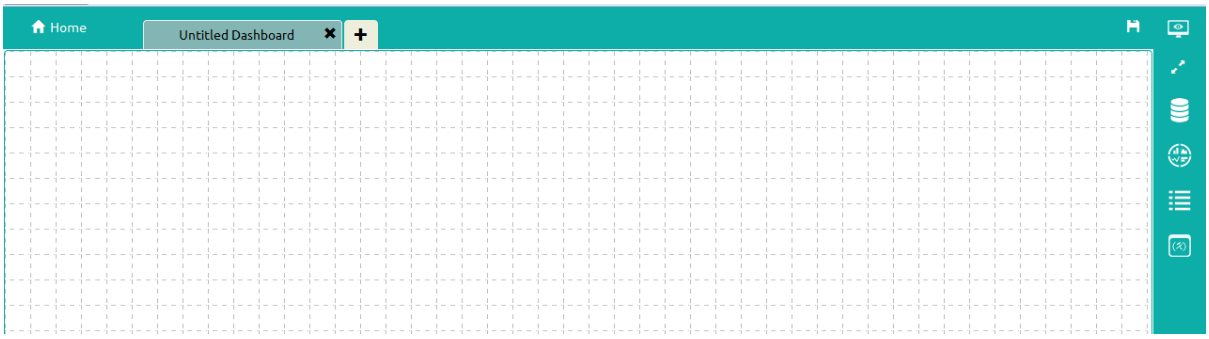
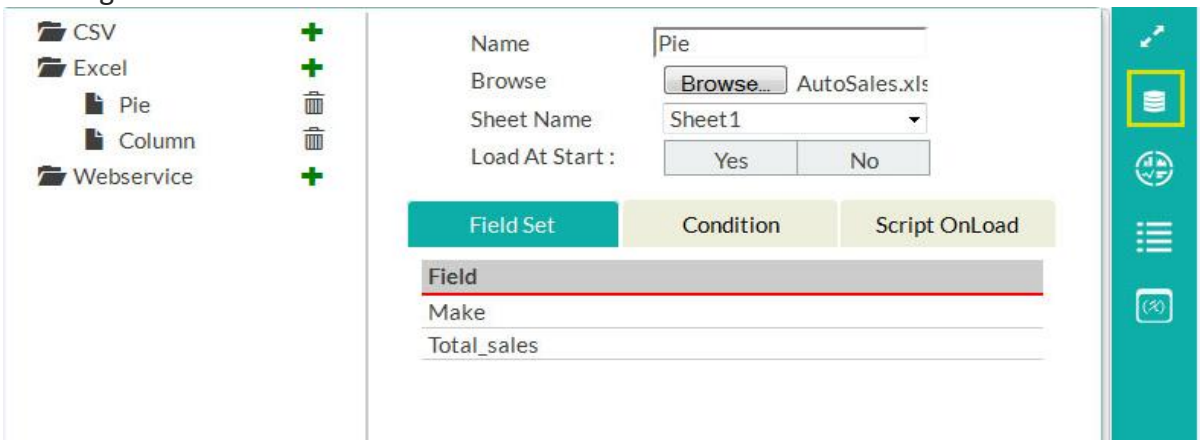


v) After selecting '**Dashboard**' a canvas (blank working area) will open.



vi) Click on the '**Data source**' icon provided on the right side of the canvas, and view the data connectivity options (ex: CSV, Excel, and Web-Service).

vii) Click on the ✚ icon to create a new connection. In this how-to guide, we are selecting an Excel data connection.



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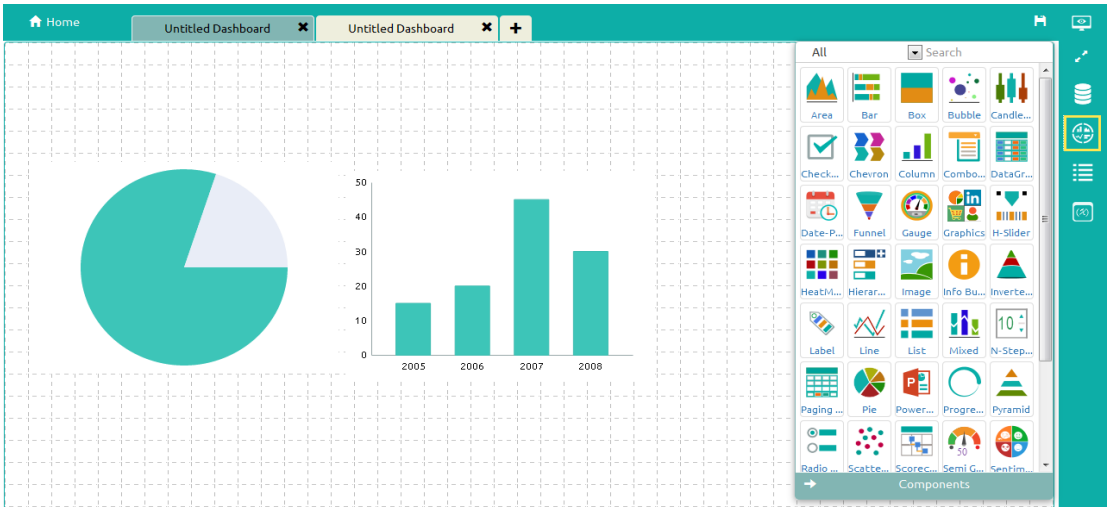
Note:

Since we wish to perform drill down analysis where we can select a piece of the pie-chart and the column chart will change to reflect that, we need to create two data sources (i.e. Pie and Column)

Fill the following details:

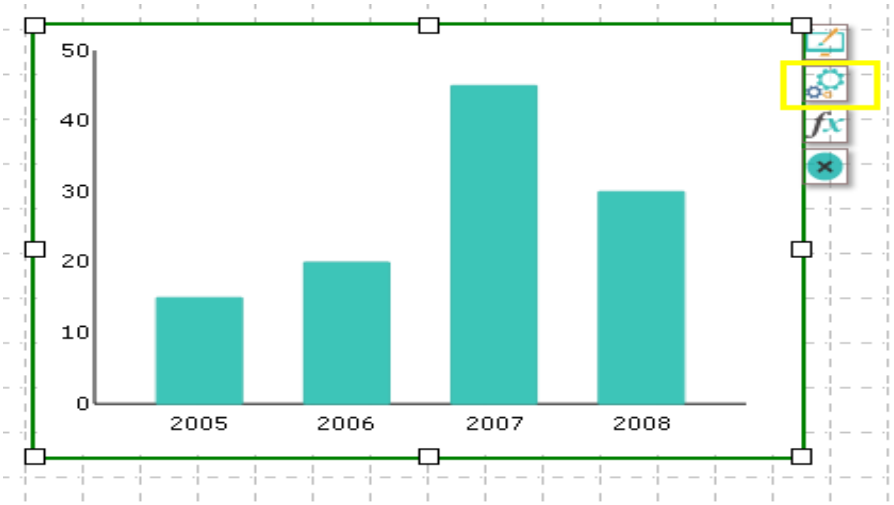
- **Name:** Name the connection
- **Browse:** Navigate to the Excel file that you wish to use as a data-source.
- **Sheet Name:** Select the sheet you wish to use from the Excel file you have selected.
- **Load at Start:** Enabling this option refreshes the data-source before opening the charts

viii) Click on '**Charts**' icon provided on the right side of the canvas.
A list of available components will be displayed.
Drag and drop the Column chart component onto the canvas.



ix) Connect the Column chart component to an existing data connection:

- Click on the settings icon that appears next to the chart, as shown below.



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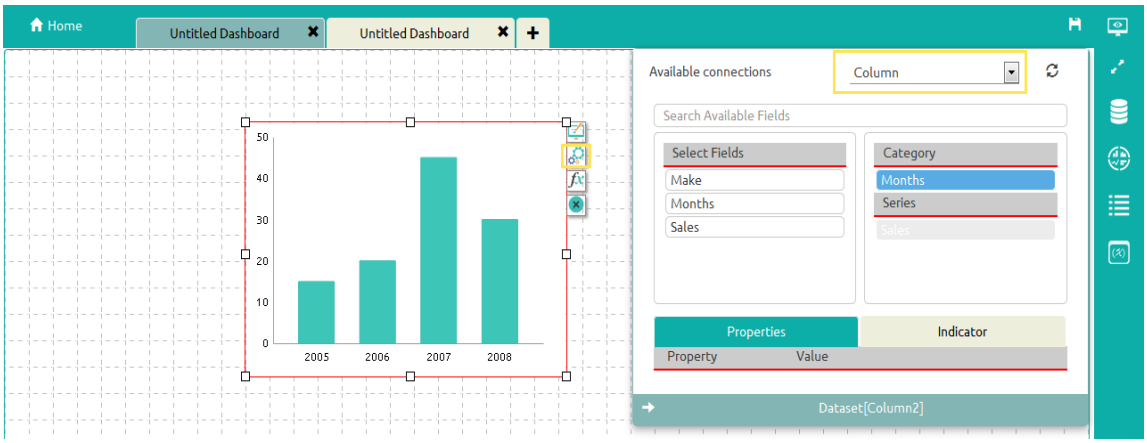
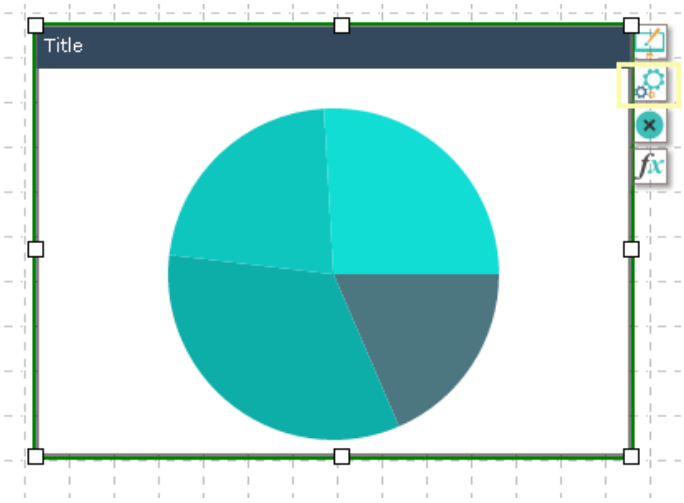
- Select a connection from the '**Available Connections**' dropdown menu (ex: Column)
- Drag and drop the fields to their respective series and categories.



x) Connect the Pie chart to an existing data connection:

- Click on the settings icon that appears next to the chart, as shown below.



- Select a connection from the '**Available Connections**' dropdown (Ex: Pie)
- Drag and drop the fields to their respective series and categories.

3.3. Enabling Drilldown Option

Click on the **'Data source'** icon provided to the right side of canvas. Select '**Column**' data source which is listed under **'Excel'** data source.

Apply the following actions:

- Select the '**Script On Load**' tab and select '**Auto Reload**' function

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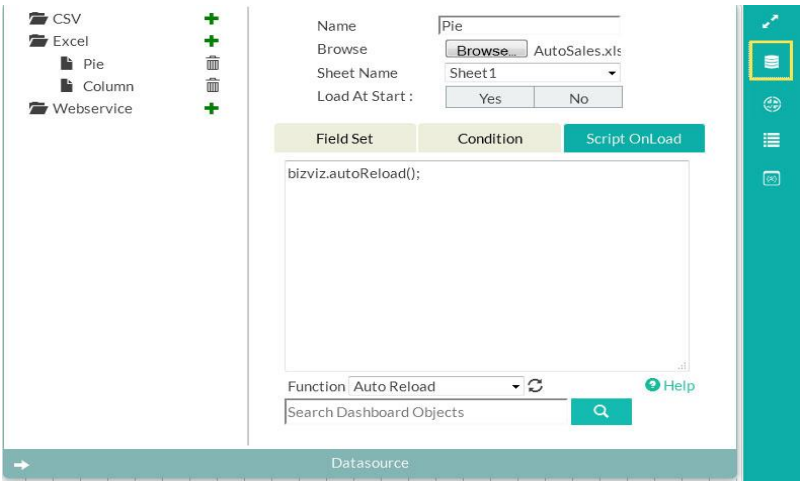
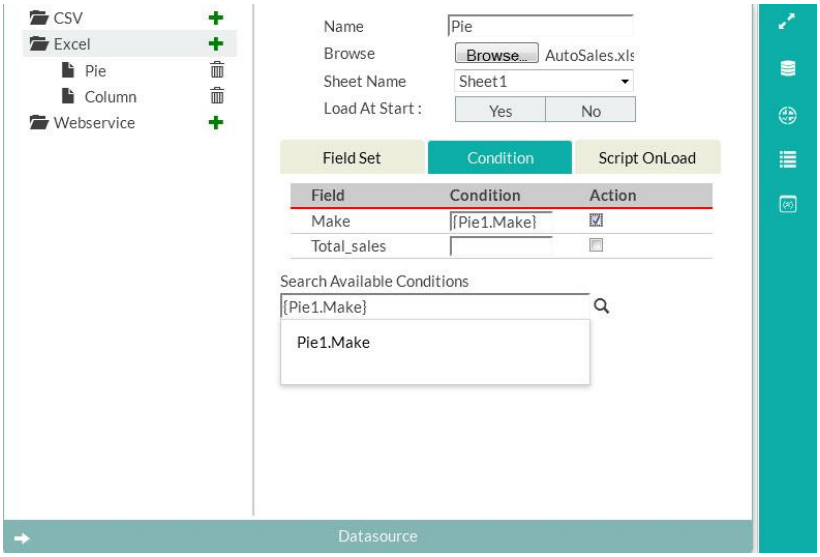


- Select the '**Condition**' tab and in the Search Available Conditions box, type the field name which you wish to use to filter data (in the example below, we are using the '**Make**' field to perform drill-down analysis)



- Copy the condition in the '**Search Available Conditions**' box and paste under the '**Condition**' field and enable the '**Action**' checkbox (as shown in the above image)
- Click on the '**Preview**' button to perform drilldown analysis.

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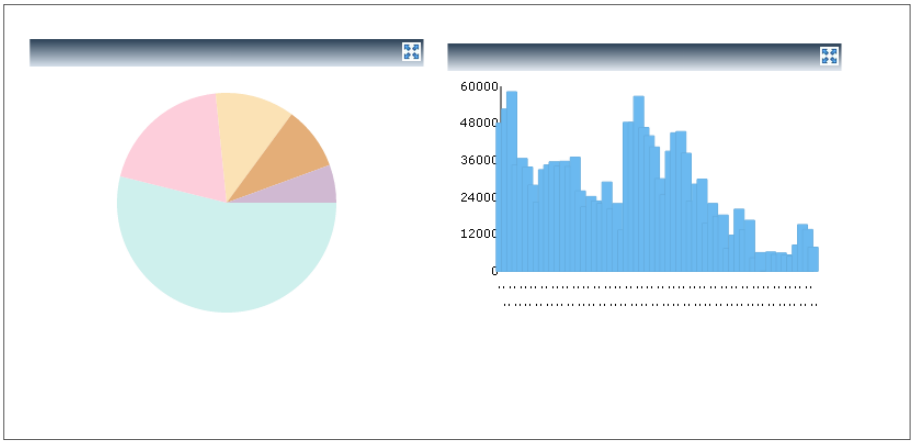

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