BizViz How-to-Guide

How to use Drilldown feature

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BIZVIZ

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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

BIZVIZ	
Email	
Password	
Enterprise 👻	
LOGIN Forgot your password?	
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iii) Click on 'Login' to view the Portal Home Screen



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.



Business Visualiz Analytics Pl	ation atform				Logged in as Avin Jain	🖲 Help	ĤH	ome	1	My account	O Logout	
My Documents	C Public Documents	🕑 Favorites			Search		×			🔓 Adminis	ration	
My Documents										🛞 User Ma	nagement	
	Automobile Industry	٥	insurance industry	٥	Retail Industry	٥				🍵 Data Ma	nagement	
										🖸 Business	Views	
			anther.							🕑 Business	Apps	
										👆 Dashboa	rd Designer	
			Ĩ							🔍 Text Ana	ılyzer	
										Report		
<									>	🚖 Survey		

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)



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.

CSV + Excel +	Name Browse Sheet Name	Pie Browse AutoSales.xls Sheet1		
Column Webservice	······································	Load At Start :	Yes	No
		Field Set	Condition	Script OnLoad
		Field		
		Make		-11
		Total_sales		

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 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:





- Select a connection from the 'Available Connections' dropdown menu (ex: Column)
 - 🔒 Home Untitled Dashboard 🛛 🗙 ٢ Untitled Dashboard 🗙 🕂 Available connections Column • C Search Available Field Q 50 Select Fields Categ ٢ 40 Make Months Series 30 Sales (%) **P** 20 10 Indicator 2005 2006 2007 2008 Ъ
- 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 **c** 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

		Name	Pie	
Excel	-	Browse	Browse Au	itoSales.xls
Pie		Sheet Name	Sheet1	~
Webservice	+	Load At Start :	Yes	No
		Field Set	Condition	Script OnLoad
		bizviz.aucoi(ei0au(),		
		Function Auto Reload	a - C	ai • Help
		Function Auto Reload	d - C	el Help

• 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)

CSV Excel Fie Column Webservice	+ + = = +	Name Browse Sheet Name Load At Start :	Pie Browse A Sheet1 Yes	utoSales.xls Vo	
		Field Set	Condition	Script OnLoad	
		Field	Condition	Action	r
		Make	{Pie1.Make}		
		Total_sales			
		Search Available Condi	itions		
		{Pie1.Make}		Q	
		Pie1.Make			
		Datasource			

- 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.



