

# BizViz How-to-Guide

## Creating an Alert in Scorecard

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## 1. Document Purpose

The purpose of this document is to guide users on how to create alerts in Scorecards. Alert's drag users attention to important stuff. It is recommended that users follow the step-by-step process given below.

## 2. Prerequisites

### 2.1. Software

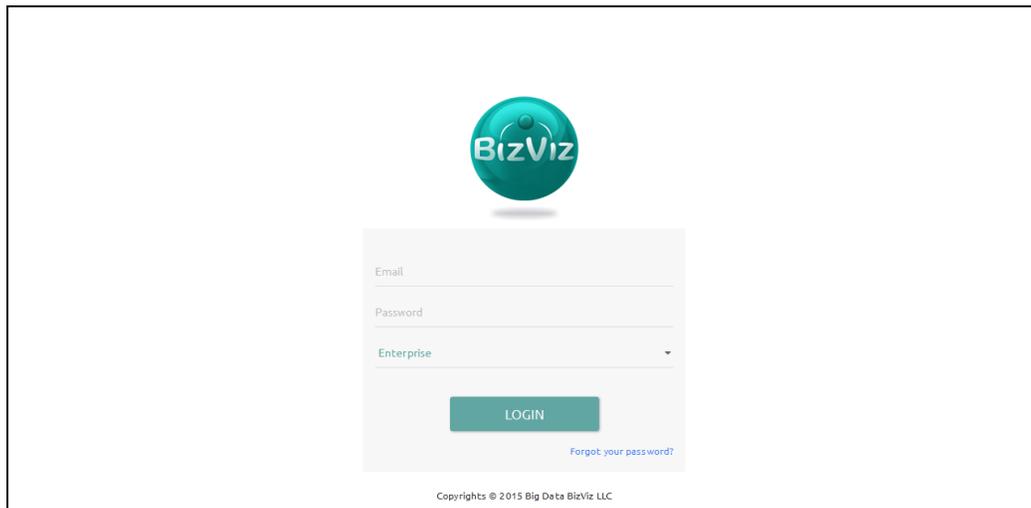
- Browser that supports HTML5
- Operating System: Windows 7

### 2.2. Basic understanding of the BizViz Server

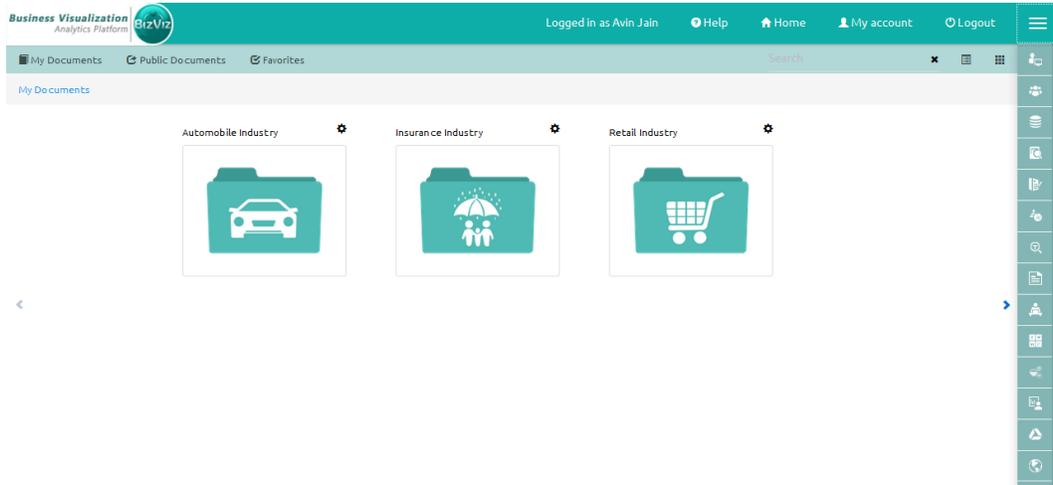
## 3. Step-by-Step Process

### 3.1. Login to the Portal

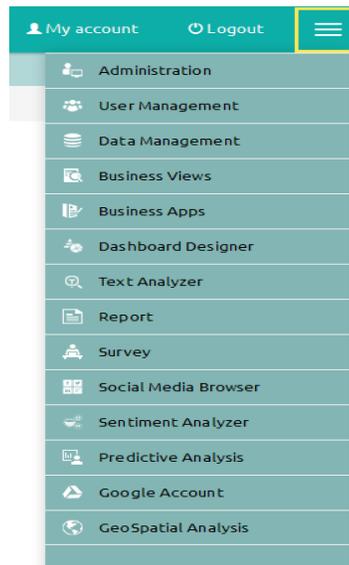
- Enter in the URL bar <http://www.bdbizviz.com/app/>
- Enter your credentials to Login



- Click on '**Login**' to view the Portal Home Screen



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



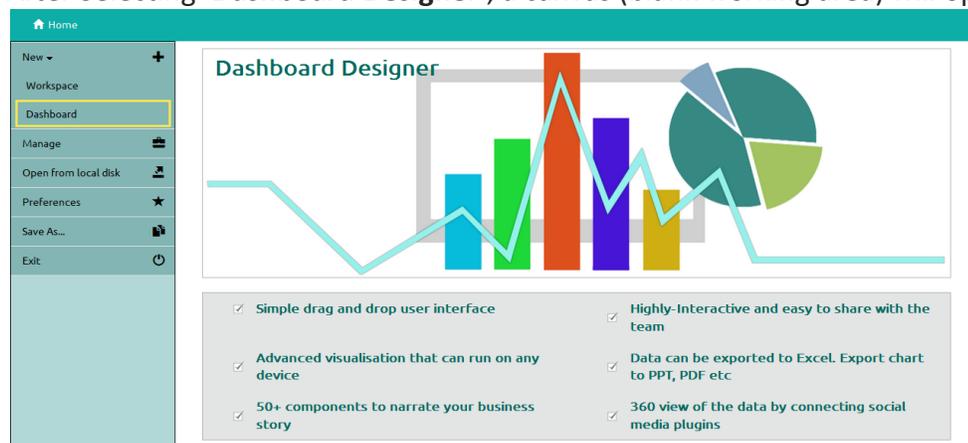
v) Click on the 'Dashboard' plug-in as shown above.

### 3.2. Creating an Alert in Scorecard

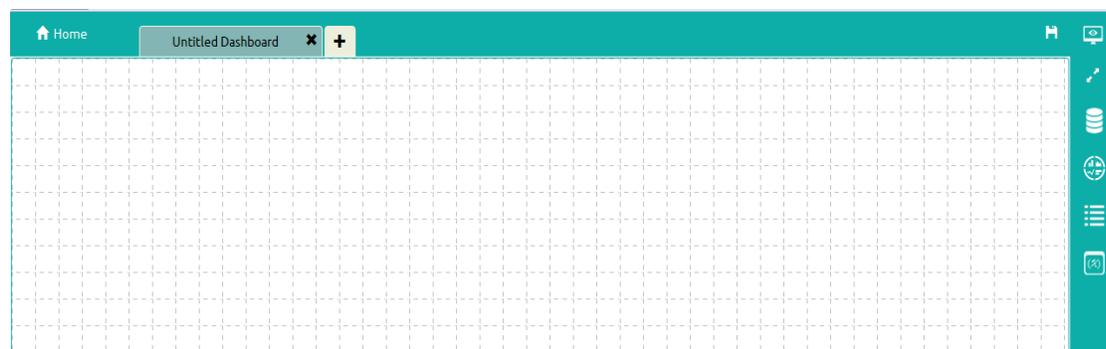
- i) Go to the Dashboard Designer Home Screen, as shown below. From the Apps drop-down menu, select Dashboard Designer.



ii) After selecting 'Dashboard Designer', a canvas (blank working area) will open.



iii) After selecting 'Dashboard' button, a web page will open.

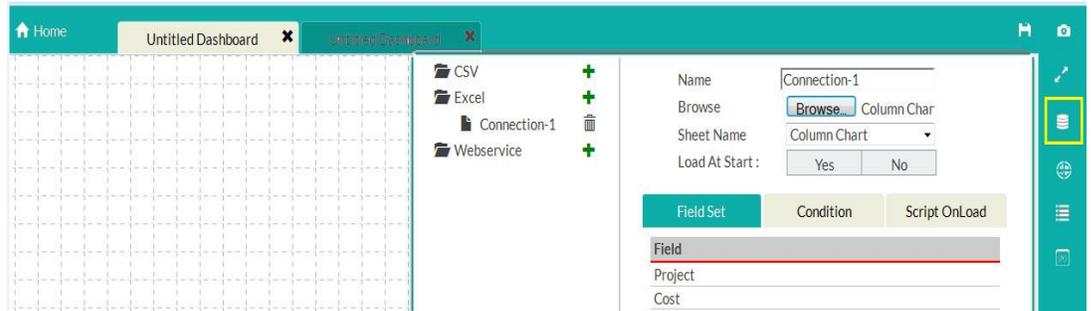


iv) Click on the 'Data source' icon  provided to the right of the canvas, and view the data connectivity options (ex: CSV, Excel, and Web-Service). Select the desired data connectivity option.

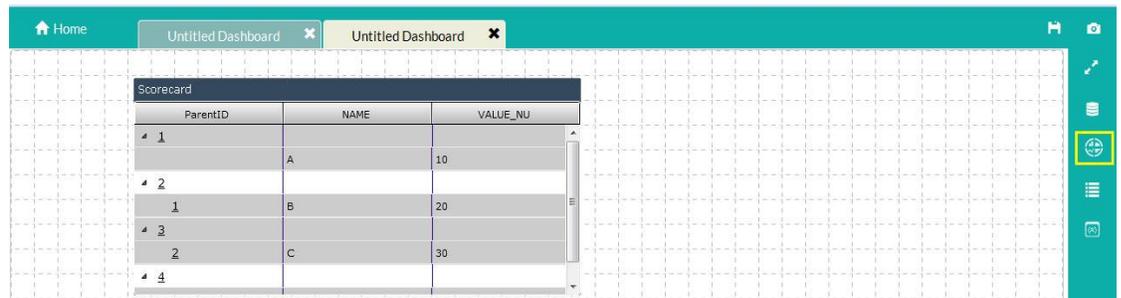
Fill in the necessary details:

- **Field Set:** Fields available in the uploaded file will be displayed

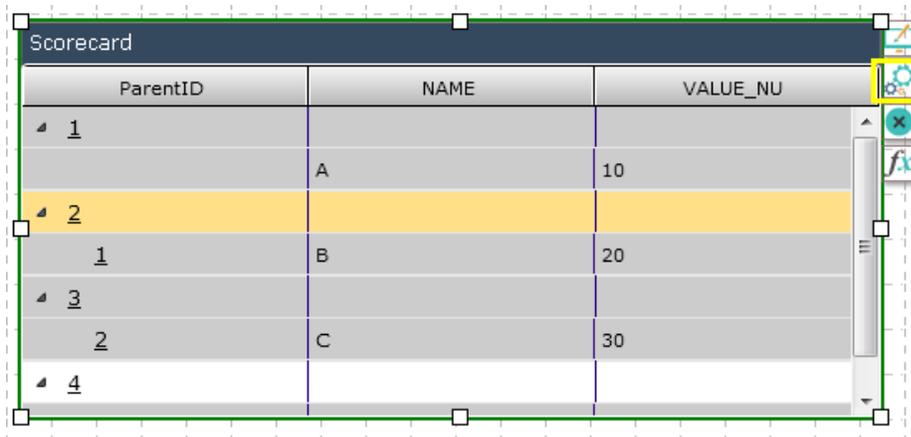
- **Condition:** Fields that can be used as filters in the query will be displayed here. The user should enable the check box next to any field he wishes to use as a filter, and enter the desired value for that filter within the ‘**Condition**’ box.
- **Script on Load:** Scripts can be written to trigger particular functions and these scripts will be loaded during the period when the components establish connection with the data sources.



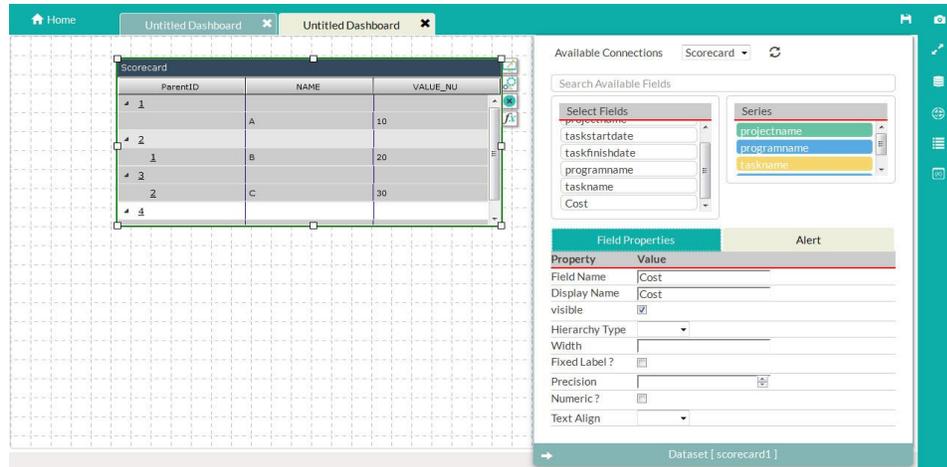
- v) Click on ‘**Charts**’ icon  provided on the right side of the canvas. A list of available components will be displayed. Drag and drop the Column chart component onto the canvas.



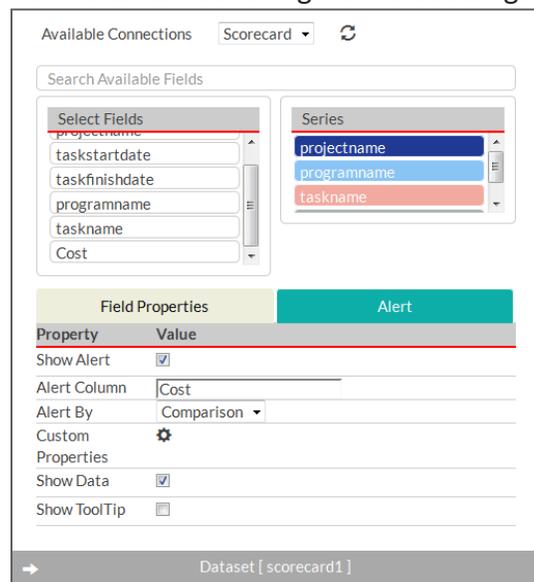
- vi) Connecting the Scorecard to a data connection
- Click on the settings icon that appears next to the chart, as shown below.



- Select a connection from the 'Available Connections' dropdown menu (ex: Connection-1)
- Drag and drop the fields to their respective series and categories.



vii) Click on the 'Alerts' tab to configure alert settings



Configure the following Alert properties:

- **Show Alert:** Enable this option to view the alerts on scorecards
- **Alert Column:** The column on which alerts should be applied
- **Alert by:** There are 2 options to view alerts:
  1. **Comparison:** Used to compare a column against the value given in the 'Compare Value' box

**Custom Properties**

Fixed Value Comparison?

Compare Value

Alert Type

Bar

Dot

Tick

Arrow

Colorfill

Alert Position

Left  Right

| Column | Operator | Value | Color |
|--------|----------|-------|-------|
| Cost   | <        | 5000  |       |
| Cost   | =        | 5000  |       |
| Cost   | >        | 5000  |       |

2. **Range:** Used to set the color based on where the column's value falls within a given range.

**Custom Properties**

Alert Type

Bar

Dot

Tick

Arrow

Colorfill

Alert Position

Left  Right

| Range from | Range UpTo | Color |                                 |
|------------|------------|-------|---------------------------------|
| 0          | 100        |       | <input type="button" value=""/> |
| 101        | 200        |       | <input type="button" value=""/> |
| 201        | 500        |       | <input type="button" value=""/> |

Add Range +

- **Custom Properties:** Configuration for Comparison and Alert options are given here.
- **Show Data:** Enable this option to view the data
- **Show Tool Tip:** Data gets highlighted when mouse hovers over the chart, along with a text bubble.

viii) Click on **'Preview'** button  to view the results

| programname                    | taskname         | Cost |   |
|--------------------------------|------------------|------|---|
| JE Enhancements - Capitalizati |                  |      |   |
| Demo Program                   | Initiation Phase | 5000 |  |
| Demo-Project-2                 |                  |      |  |
| Demo Program                   | Initiation Phase | 6755 |  |
| Web Development - OM Interfe   |                  |      |   |
| Demo Program                   | Initiation Phase | 5234 |  |
| Project-3                      |                  |      |  |
| Demo Program                   | Initiation Phase | 4543 |  |

