BizViz How-to-Guide

Creating an Alert in Scorecard

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BizViz

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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

- 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



Statistics Martine for Martine

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.

A Home Unt	itled Dashboard 🗙 🕂 🗎
	• • • • • • • • • • • • • • • • • • • •

- 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.

Home	Untitled Dashbo	ard 🗙 Untitled I	Dashboard 🗙	H	
	Scorecard ParentID	NAME	VALUE_NU		
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	<u>⊿ 2</u>	Î			
	<u>1</u>	В	20	_	Г
	2	с	30		
	<u>▲ 4</u>				

vi) Connecting the Scorecard to a data connection

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

Scorecard							
ParentID	NAME	VALUE_NU	o.				
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1	в	20 🗉	ľ				
4 <u>3</u>			-				
2	с	30					
▲ <u>4</u>							
			<u>ר</u>				

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

Untitled Dashboar	rd 🗙 Untitle	d Dashboard 🗙					
				Available Conr	ections Score	card - S	
Scorecard				Search Availa	hle Fields		
ParentiD	NAME	VALUE_N		Searchrywand	one menero		
• 1		10	6	Select Fields	1	Series	
	A	10		taskstartdat	· ·	projectname	
 · ∠ .			- P	taskfinishda	te	programname	E
1	Б	20		programnam	ie E	taskname	-
* <u>1</u>				taskname			
2	C	30		Cost			
4 4			-				
				Field I	Properties	Alert	
				Property	Value		
			1 1 1 1	Field Name	Cost		
				Display Name	Cost		
				visible			
				Hierarchy Type	•		
				Width			
				Fixed Label ?			
				Precision			
				Numeric?			
				Text Align	-		
			3 1 1 4	120	Datarat	concord11	

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

Available Conne	ections Scoreca	rd 🗸 💭
Search Availab	ole Fields	
Select Fields taskstartdate taskfinishdat programname taskname Cost		Series projectname programname taskname
Field P	roperties	Alert
Property	Value	
Show Alert	V	
Alert Column	Cost	
Alert By	Comparison -	
Custom Properties	¢	
Show Data	\checkmark	
Show ToolTip		
→	Dataset [s	corecard1]

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 Val	ue Comparison?					
Compare	Value	5000 🚔				
Alert Typ	e	Bar				
		Dot				
		Tick				
		Arrow				
		Colorfill				
Alert Pos	ition	Left Right				
Column	Operator	Value Color				
Cost	<	5000				
Cost	=	5000				
Cost	>	5000				
		Ok Cancel				

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

Alert Type		۲	Bar	
		\bigcirc	Dot	
		\bigcirc	Tick	
		\bigcirc	Arrow	
		\bigcirc	Colorfill	
Alert Position		۲	Left	
		\bigcirc	Right	
Range from	Range UpTo	Со	lor	
0	100			Î
101	200			Î
201	500			Ô
	.		Ok	Cancol

- **Custom Properties:** Configuration for Comparison and Alert options are given here.
- Show Data: Enable this option to view the data

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• Show Tool Tip: Data gets highlighted when mouse hovers over the chart, along with a text bubble.

viii)Click or	n ' Preview' button	to view the resu	ults
	programname	taskname	Cost
	JE Enhancements - Capitalizati		
	Demo Program	Initiation Phase	5000
	Demo-Project-2		.utl
	Demo Program	Initiation Phase	6755
	۵		
	Web Development - OM Interfa		
	Demo Program	Initiation Phase	5234
	▲ Project-3		.ull
	Demo Program	Initiation Phase	4543



