BizViz How-to-Guide

Creating Dashboard using Web-service

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1. Document Purpose

The scope of this document is to guide users on how to create dashboards using a Web-Service connection. 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

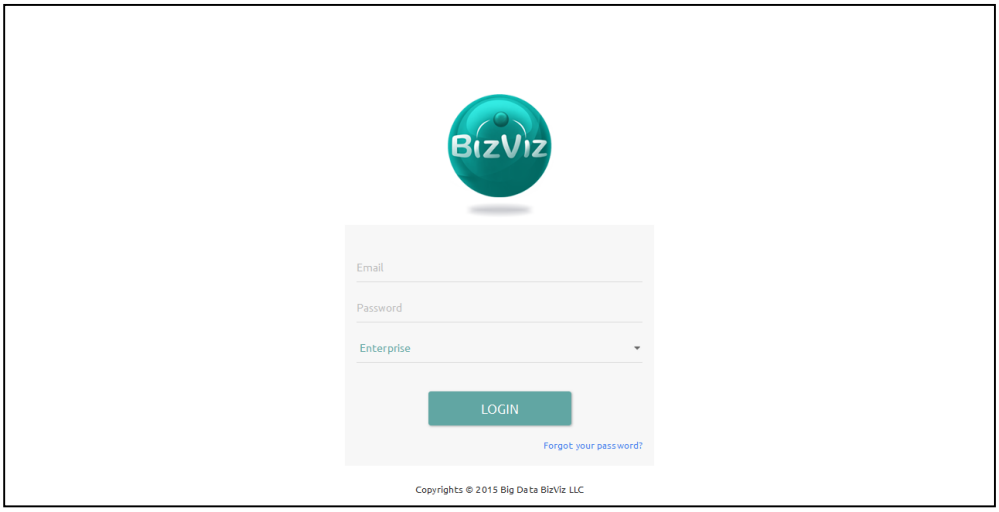
2.2. Basic understanding of the BizViz Server

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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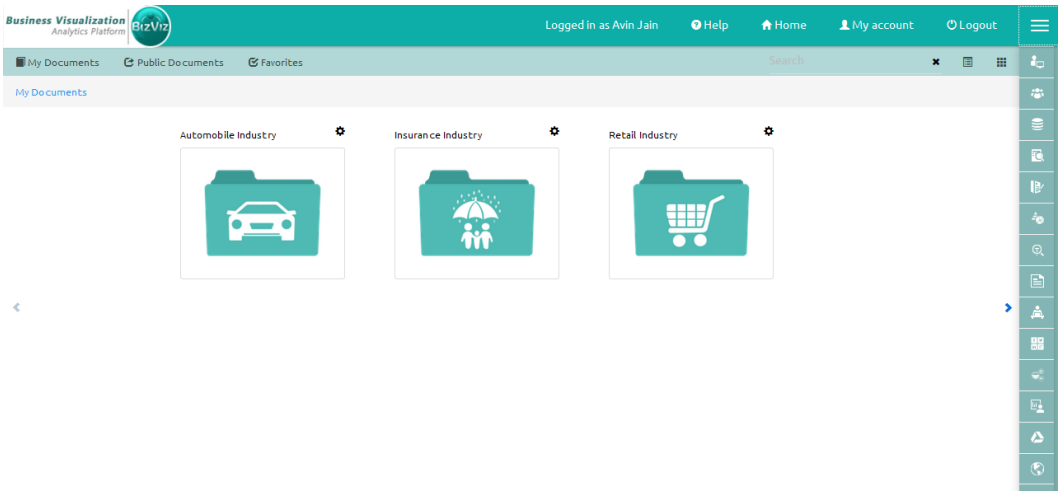
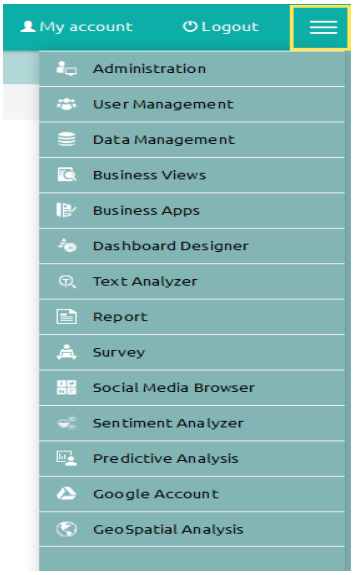


iv) Click on the '**Menu**' button to display the list of installed apps.



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

3.2. Steps to Create a Dashboard using a Data Connection

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

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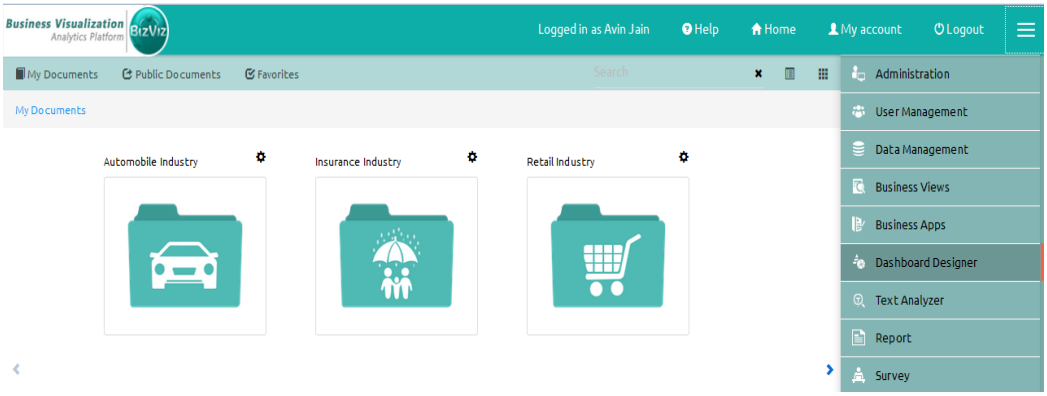
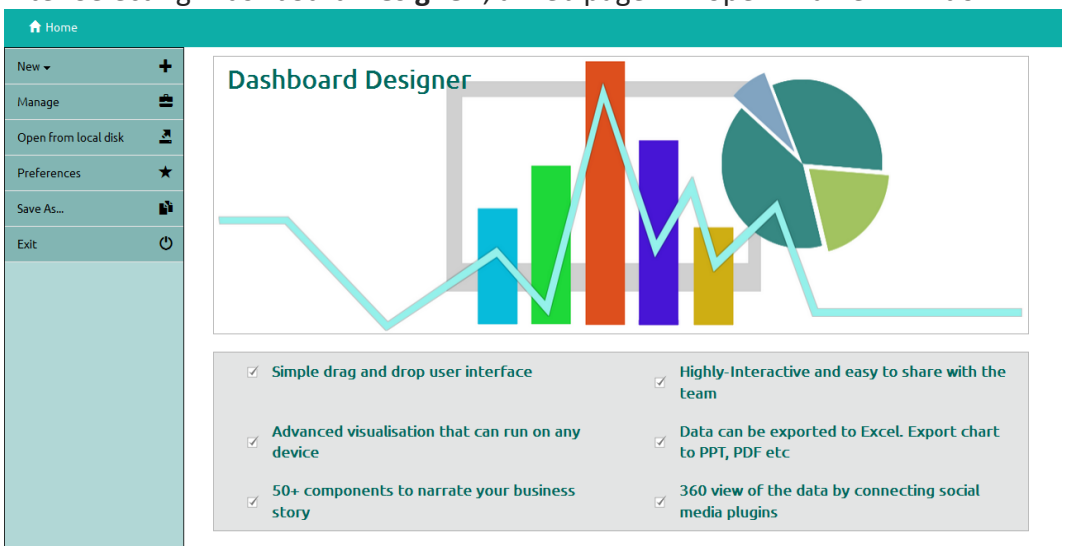


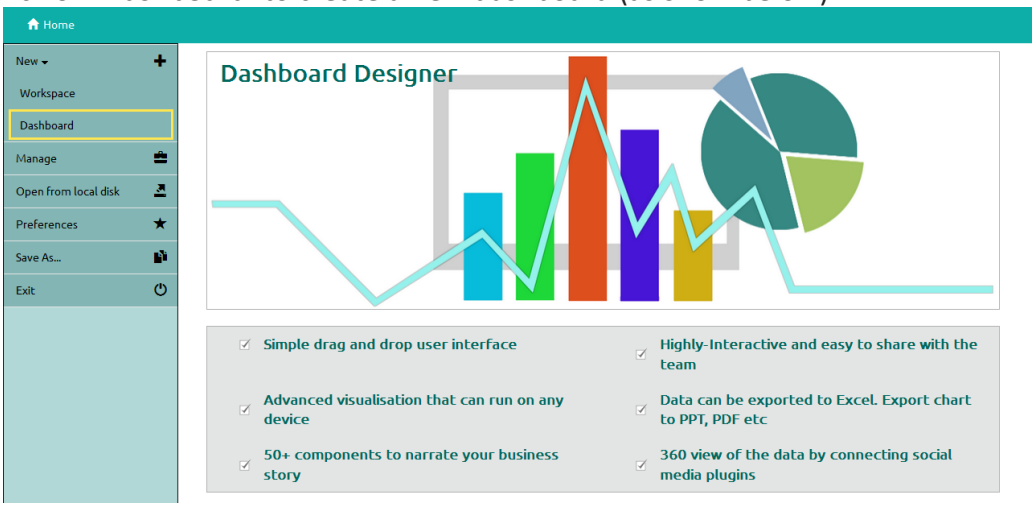
ii) After Selecting '**Dashboard Designer**', a web page will open in a new window.



iii) Click on the '**New +**' drop-down menu as shown above. 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) Click on '**Dashboard**' to create a new dashboard (as show below)



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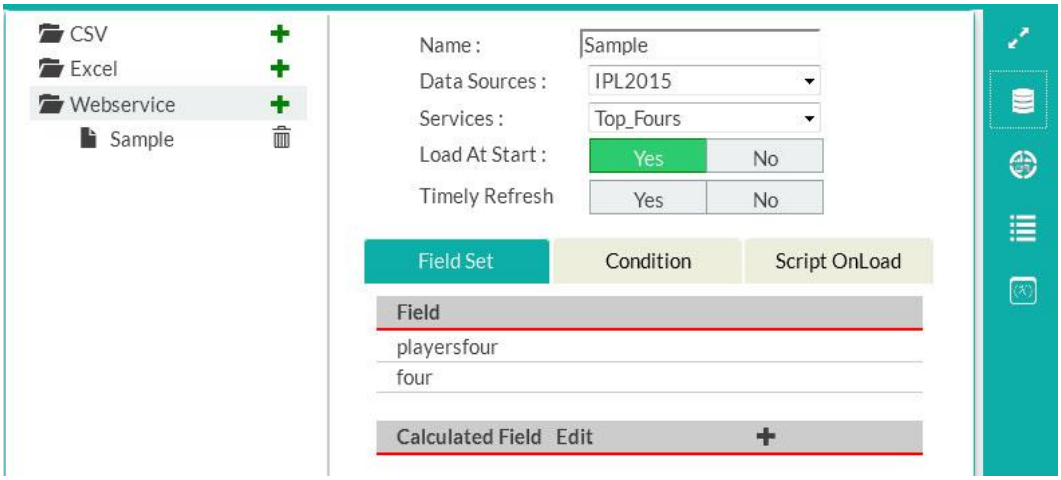
v) After selecting '**Dashboard**' a canvas (blank working area) will open.

vi) Click on '**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 next to the desired connectivity option, to create a new connection.



viii) Fill in the necessary details

- **Name**: Name the connection
- **Data Sources**: Select a Data Source from the list (all the data-sources available in Data-Management will be listed here)
- **Services**: Select a query from the list (all the queries available for the selected Data Source will be listed)
- **Load at Start**: Enabling this option refreshes the data-source before opening the charts
- **Timely Refresh**: Data will be updated periodically
- **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 when the chart is opening the dashboard.

ix) Click on the '**Charts**' icon provided on the right side of the canvas.

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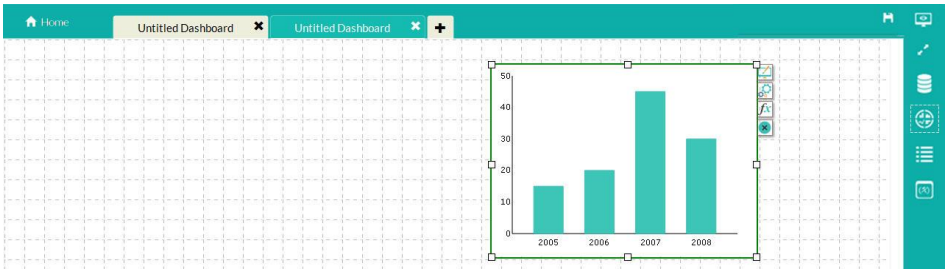
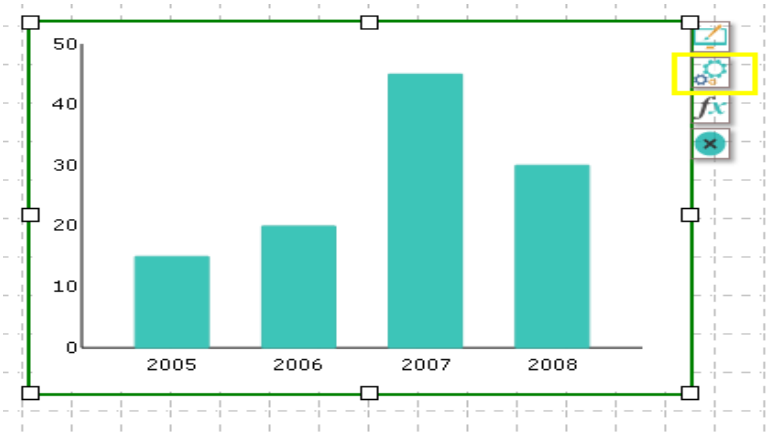
A list of the available components will be displayed.
Drag and drop the Column Chart component onto the canvas

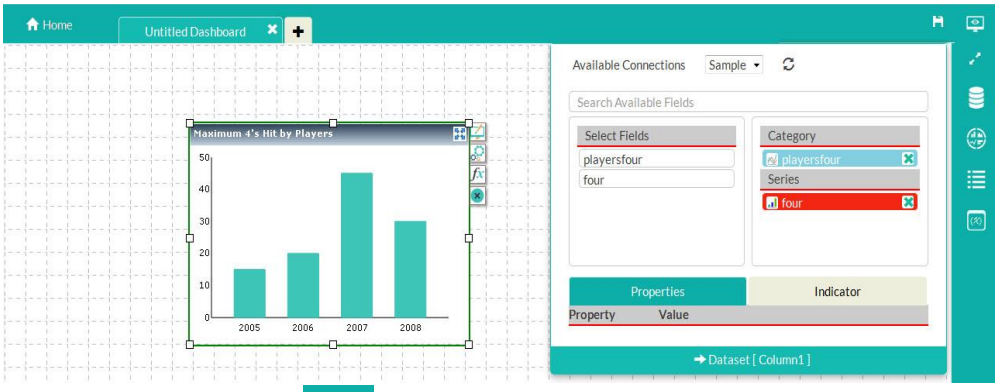


x) Connect the Column chart component to an existing data connection:

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



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



- Click on '**Preview**' icon to view the results

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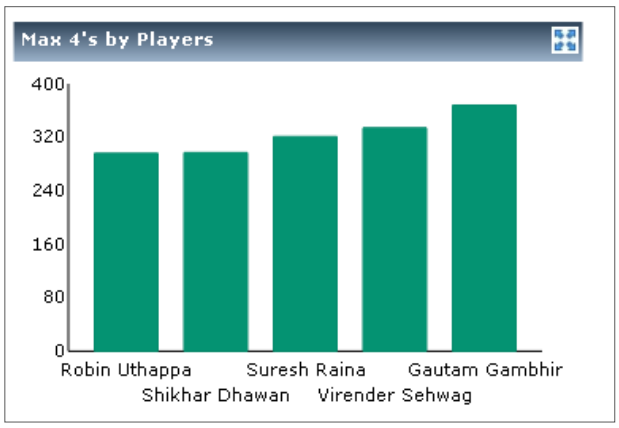

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