BizViz Business Views User Guide

BizViz Business Views 1.0

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1. About this Guide

1.1. Document History

Product Version	Date (Release date)	Description
BizViz Business Views 1.0	July 22 , 2015	First Release of the document

1.2. OverView

This guide covers:

- Introduction and Access to the BizViz Business Views
- Creating and Displaying a Business Views
- Creating and Displaying a Filter

1.3. Target Audiences

This document is aimed at business professionals who use BizViz Business Views to get an easy to understand insight out of their business data.

2. Getting Started with the BizViz Sentiment Analyzer

2.1. Introdcution to the BizViz Sentiment Analyzer

BizViz Business Views are mini-reports that can be used by management to get a snapshot view of their business. They are quick to generate and easy to view reports based on real-time information. These reports can be accessed on the fly by the end user. Business Views display the data in a data-grid format hence, users can have access to a detailed view of the data. BizViz Business Views can provide customized reports as per the business needs by filtering the data. This reporting feature is capable of generating ad-hoc reports to drill down into the data through drag and drop of dimentions and measures.

2.2. Installation Prerequisites and Supported Devices

- ➢ **Prerequisites for Deployment of the BizViz Sentiment Analyzer**
    - o Software that supports HTML5
    - o Operating System: Windows 7
    - o Basic understanding of the BizViz Server
- ➢ **Supported Devices**
    - o Web/ Tablet Browser

3. Accessing the BizViz Business Views

User can follow a step by step process given below to access the BizViz Platform and access the variety of plugins.

1. URL: **http://www.bdibizviz.com/app/**
2. Enter your credentials to Login
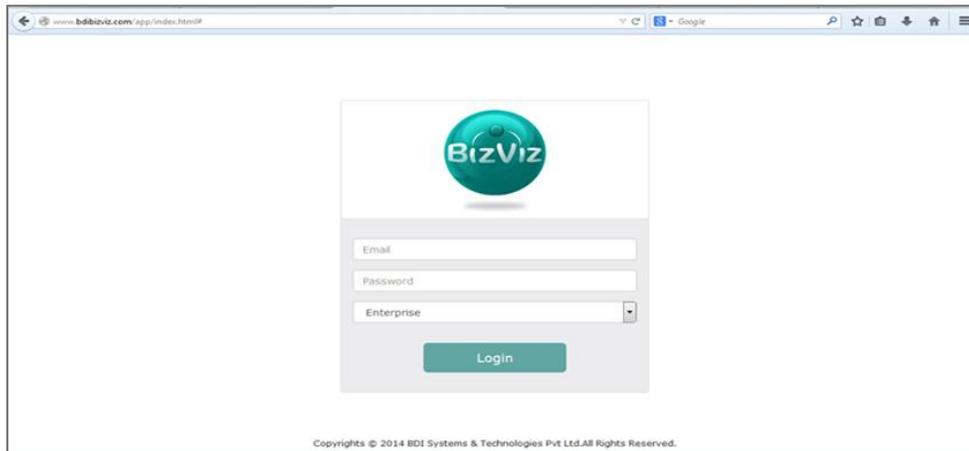
3. Click on '**Login**' to access the BizViz Platform Home Screen
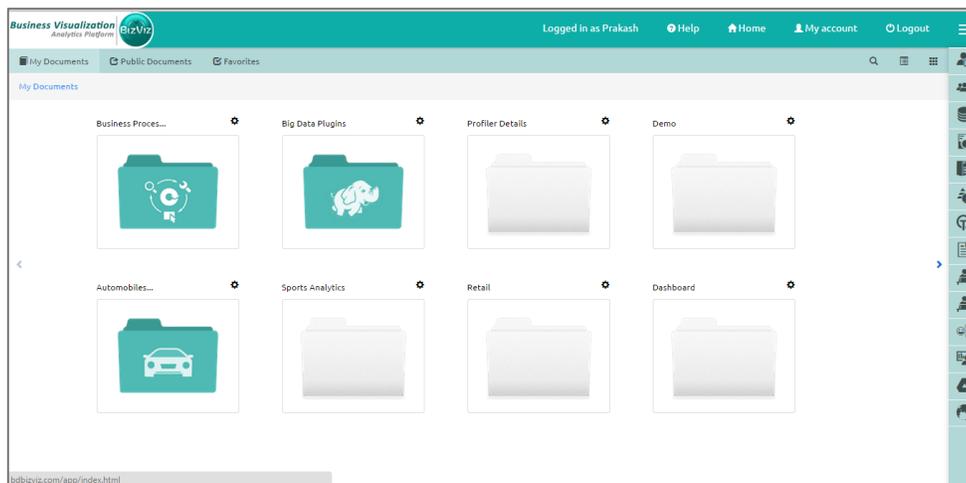
4. Select Business Views icon from the list of available plugins from the Platform home screen.

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5. Business Views Home Screen will open
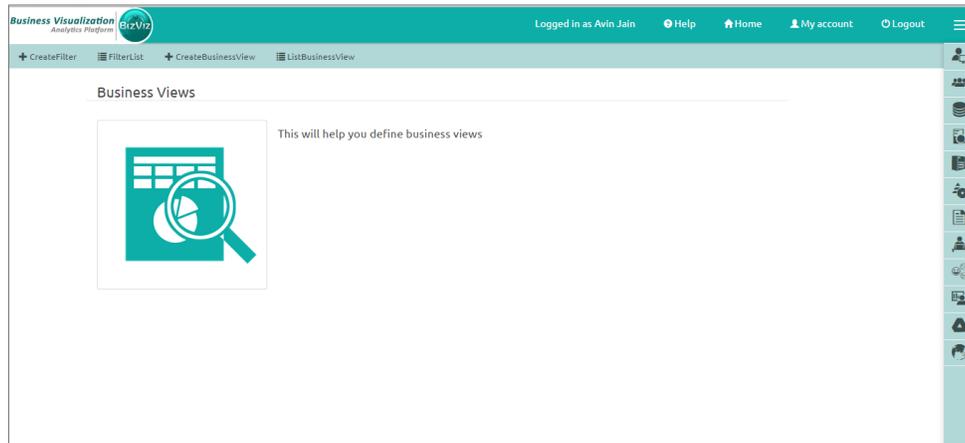
4. Creating and Customizing Business Views

4.1. Creating a Business View: Creating a Report

1. Go to the Business Views Home Screen
2. Click on '**Create Business View**'
3. Enter '**Business View Name'**
4. Select a '**Query Name'** from the drop-down list
5. Click on '**Save'**
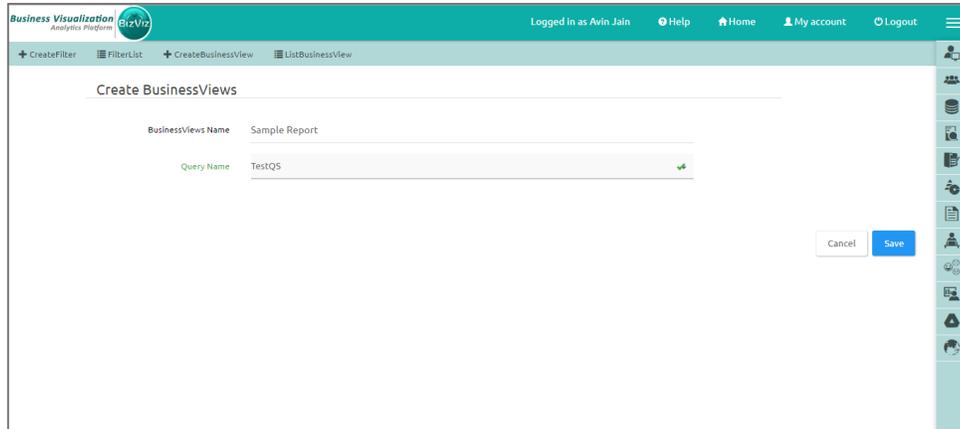
6. A Pop-up message appears to assure that a Business View has been created successfully.
7. Click on **'List Business View'** from the Business View Home Screen
8. A list of all the previously created Business Views will be displayed

4.2. Editing a Business View

1. Select a Business View from the '**List Business View'** to edit
2. Click on '**Edit'** icon
3. It will redirect on the '**Edit Business View'** screen displaying the below mentioned Business View details:
   a. **Business View Name**: It can be changed or modified (if desired)
   b. **Query Name**: A new Query name can be selected from the drop-down menu (if desired)
4. Click on '**Save'** to save the modifications

4.3. Deleting a Business View

1. Click on '**List Business View'** option from the Business View Home Screen
2. A list of all the created Business Views will be displayed
3. Select a Business View from the list that you wish to delete
4. Click on '**Delete'** icon
5. A pop-up window will appear to confirm the deletion

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6. Click on '**Ok'**
7. The desired Business View will be successfully Deleted

Note: Click on '**Search**' option to search a specific Business View.

4.4. Creating a Business View from the Platform Home Screen
1. Go to Platform Home Screen
2. '**My Documents'** opens by default
3. Click on ⚙ option provided on any folder
                    OR
     Right Click on any folder/ the blank space of the Home Screen
4. Select '**Create Business View**' from the drop-down list
5. '**Create Business View'** window will pop-up
6. Select a '**Business View'** from the drop down menu
7. Enter '**Display Name'** and '**Description**'
8. Click on '**Save**' option to save the inserted details
9. A Pop-up message appears to assure that the Business View has been successfully created

4.5. Steps to View a Business View (Created on the Platform Home Screen)
1. The Business View created on the blank space of the platform home screen can be displayed on the '**My Documents'** screen. E.g. My Documents > Business View (Sample Business View)
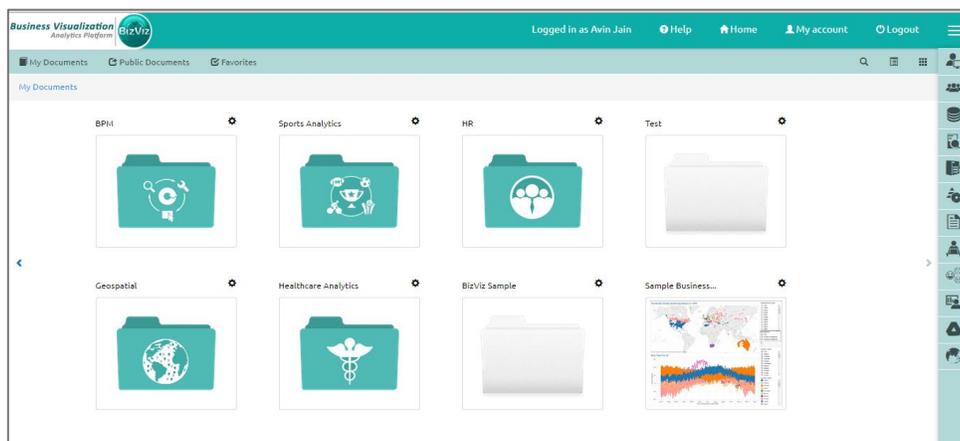
2. The Business View created inside a folder can be displayed by selecting the folder E.g. My Documents > Folder (Test) > Business View (Sample Business View)

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4.6. Performing Drill Down Operations on a Report

- **Drill Down** – Users can drill down into a field hierarchically by clicking on a field.

  (ex. Country → State → District → City)

- **Cross Drill** – Drill across a particular field sideways (i.e. at the same level)

  (ex. California → Florida → Indiana).

The user doesn't require to drill all the way up to the highest level of the hierarchy, select a different top-level field, and then drill down.

- **Design** – This feature is used to customize reports, by changing dimensions and measures.
  1. Click on '**Design**' option from the top left of the screen.
  2. Select to drag fields from the '**Dimension**' and '**Measure'** sections
  3. Drop the fields onto the canvas provided on the right side of the screen
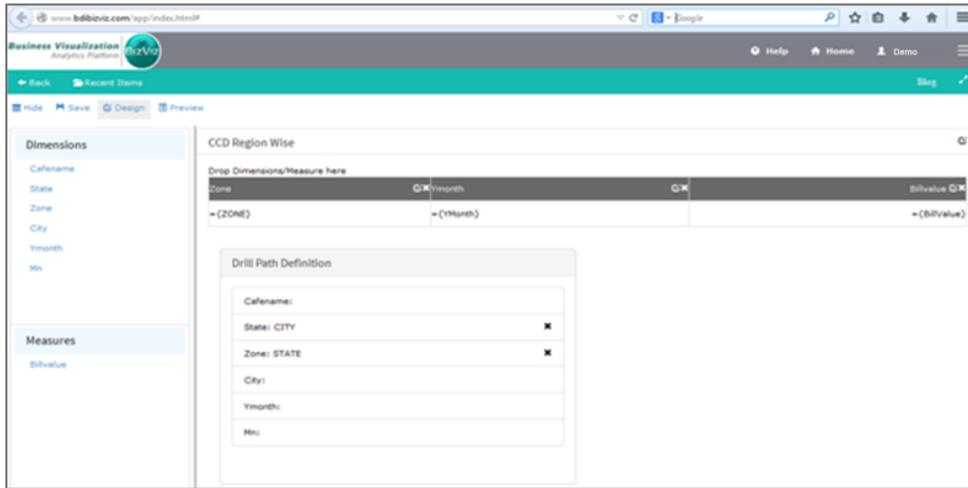
- **Report icons:**

Sl. No.	Icon	Name of Icon	Description
1.		Edit	Edit column names
2.		Delete	Delete the column
3.	Blog	Blog	Insert comments
4.		Hide Nav Bar	Hide the upper navigation menu bar

- **Report options:**
  a. **Hide** – Hide the object panel
  b. **Save** – Save the report
  c. **Design** – Create/Modify a report
  d. **Preview** – View the report
  e. **Refresh** – Refresh the report's objects. This option will be available while in the preview screen.

5. **Filters**

Business Views display large volumes of data that can cause reports to take a long time in displaying the entire data. Global Filter variable can be used on a Business View to resolve this problem. Global Filter variable when applied to a query, confines the report to specific data as required by the end-user.

5.1. Creating a Filter

1. Click on '**Create Filter'** option from the Business Views home screen
2. '**Create Filter'** screen will open
3. Fill in the required details:
   a. **Filter Name**: Enter a name for the filter

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b. **Filter Type**: Select a filter type from the drop-down menu

c. **Default Value**: Enter the default value

4. Click on '**Save'** to save the inserted details

When the query is executed, only data from the '**East**' region will be displayed in the report (as shown below)

Steps to View a Filter Details:

1. Click on '**Filter List**' option from the Business Views home screen

2. A list of all the previously created filters will be displayed with the below mentioned filter details:

   a. Filter Name

   b. Filter Values

   c. Default Values

   d. Created Date

   e. Edit Icon

   f. Delete Icon

5.2. Editing a Filter

1. Select a Filter you wish to edit from the '**Filter List'** screen

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2. Click on '**Edit**' icon

3. '**Edit Filter**' screen will open

4. The below mentioned filter details can be edited:

   a. **Filter Name**: Change or Modify name of the filter

   b. **Filter Type**: Select another option from the drop-down menu

   c. **Default Value**: Change or modify the default value

5. Click on '**Save**' to save the modifications
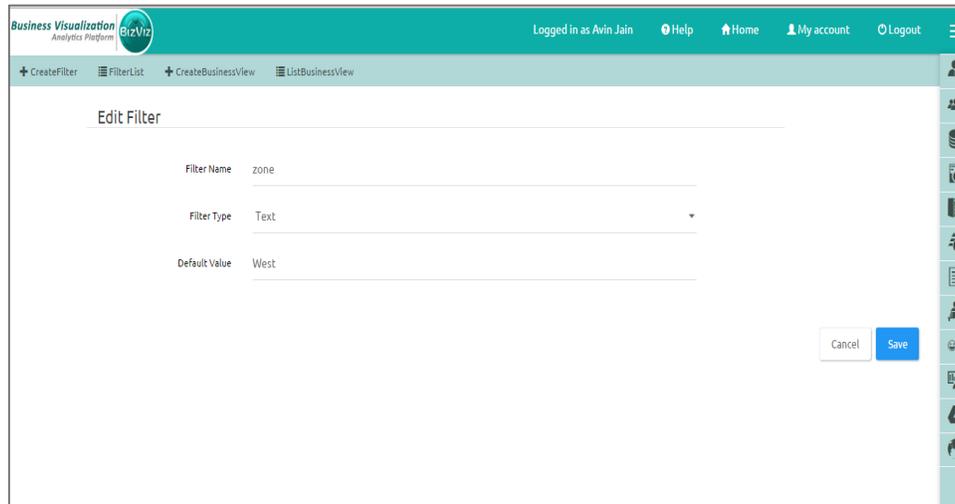
Note: If the selected filter type is '**List**', then there will be an additional '**Value**' field to modify.

5.3. Deleting a Filter

1. Select a filter you wish to delete from the '**Filter List**' screen

2. Click on '**Delete**' icon

3. A pop-up message appears to confirm deletion

4. Click on '**Ok**'

5. The selected filter will be successfully deleted

6. Logging Out

Click on '**Logout'** option provided in the Header Panel of the BizViz Platform. You will be successfully logged out from the **BizViz Business View.**

Note: Clicking on '**Logout'** redirects the user back to the '**LOGIN'** page of the BizViz Platform.

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