

# BizViz Business Views User Guide

## BizViz Business Views 1.0

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## Table of Contents

- 1. About This Guide .....1**
- 1.1. Document History .....2
- 1.2. overview .....3
- 1.3. Target Audience.....3
- 2. Getting Started with the BizViz Business Views .....1**
- 2.1. Introduction to the BizViz Business Views .....2
- 2.2. Installation Prerequisites and Supported Devices.....3
- 3. Accessing the BizViz Business Views .....4**
- 3.1. Accessing the BizViz Platform Home Screen .....5
- 3.2. Accessing the BizViz Business Views App Screen .....6
- 4. Business Views .....1**
- 4.1. Creating a Business View: Creating a Report .....2
- 4.2. Performing Drill Down Operations on a Report .....3
- 4.3. Creating a Filter .....3
- 4.4. Steps to View a Filter List .....3
- 5. Logging Out .....1**



## 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. Introduction 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 dimensions and measures.

### 2.2. Installation Prerequisites and Supported Devices

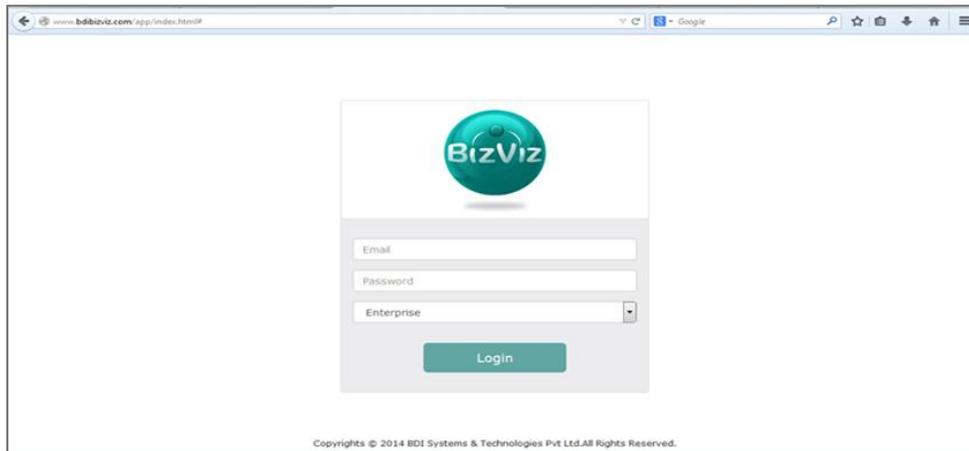
- **Prerequisites for Deployment of the BizViz Sentiment Analyzer**
  - Software that supports HTML5
  - Operating System: Windows 7
  - Basic understanding of the BizViz Server
- **Supported Devices**
  - Web/ Tablet Browser



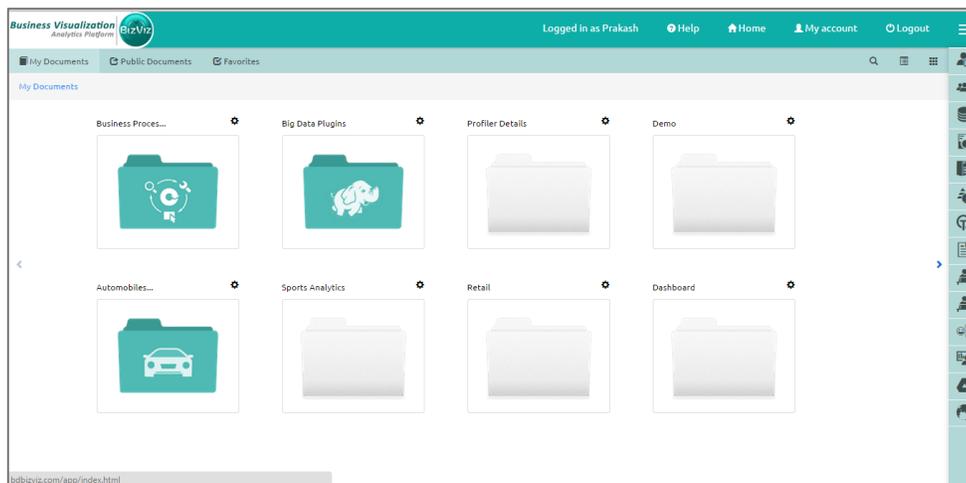
### 3. Accessing the BizViz Business Views

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.bdbizviz.com/app/>
2. Enter your credentials to Login



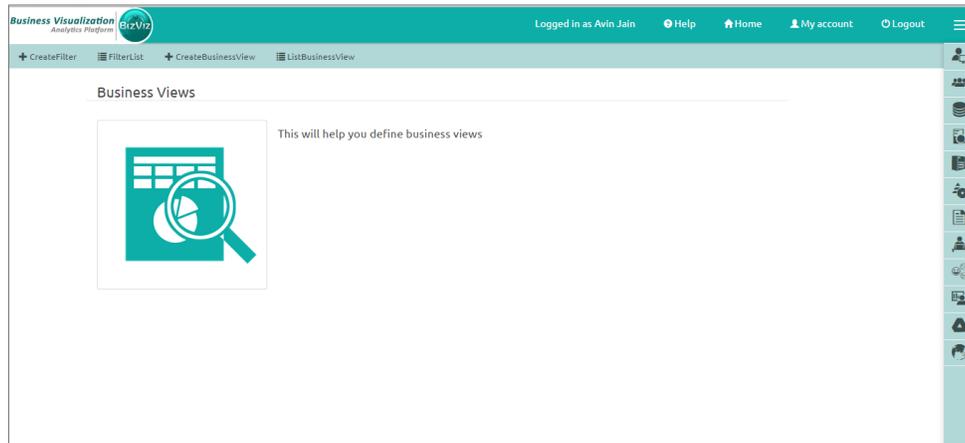
3. Click on 'Login' to access the BizViz Platform Home Screen



4. Select Business Views icon  from the list of available plugins from the Platform home screen.



5. Business Views Home Screen will open

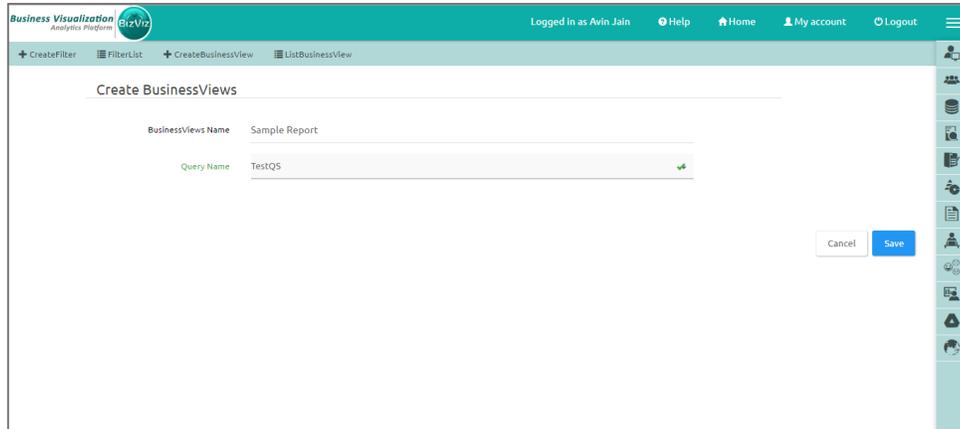




## 4. Creating and Customizing Business Views

### 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



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

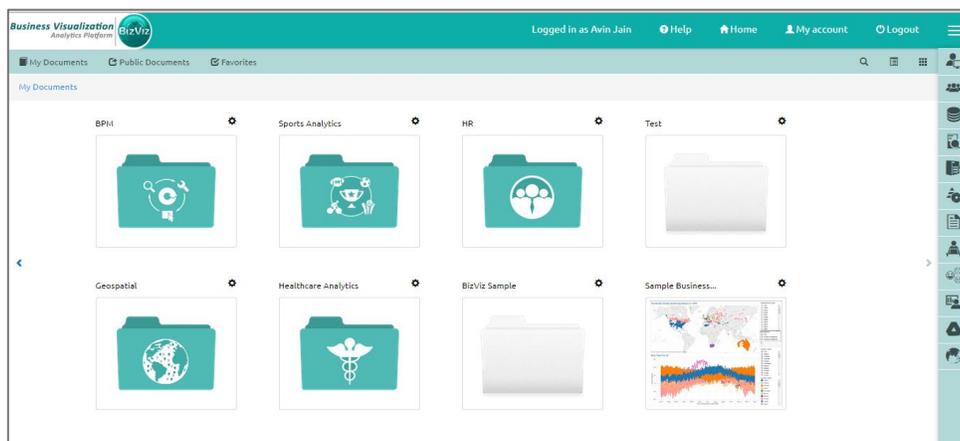
**OR**

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)



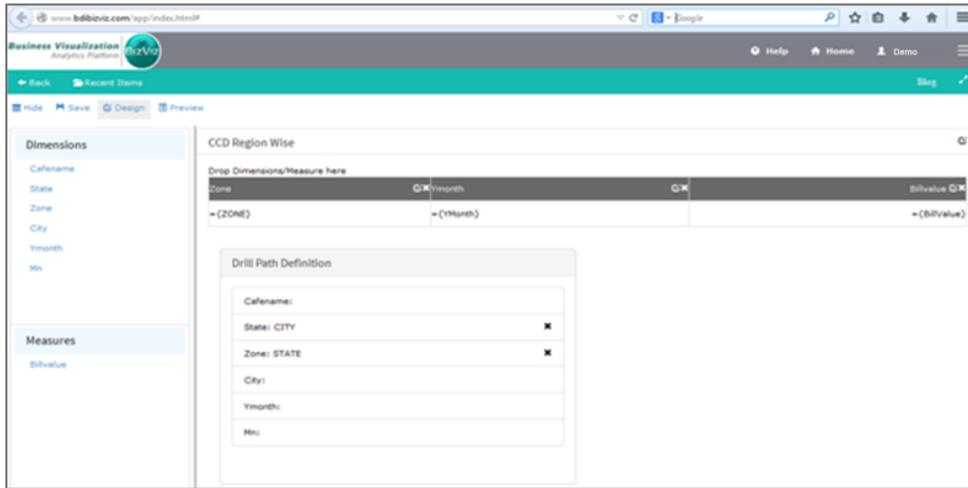
#### 4.6. Performing Drill Down Operations on a Report

- **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.

Zone	Yearmonth	BillValue
SOUTH		
WEST	2008-April	9,199
NORTH	2008-May	12,720
EAST	2008-June	12,103
ASSAM	2008-July	11,778
ASSAM	2008-August	9,464
ASSAM	2008-September	8,717
ASSAM	2008-October	9,536
ASSAM	2008-November	8,073
ASSAM	2008-December	9,586
ASSAM	2009-January	9,129
<b>Summary</b>		<b>2,520,619</b>

- **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	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



- 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)

Zone	Yearmonth	BidValue
SAST	2008-April	95,521
SAST	2008-May	109,581
SAST	2008-June	102,715
SAST	2008-July	105,989
SAST	2008-August	102,014
SAST	2008-September	95,877
SAST	2008-October	96,274
SAST	2008-November	81,910
SAST	2008-December	66,354
SAST	2009-January	80,078
<b>Summary</b>		<b>42,376,971</b>

### Steps to View a Filter Details:

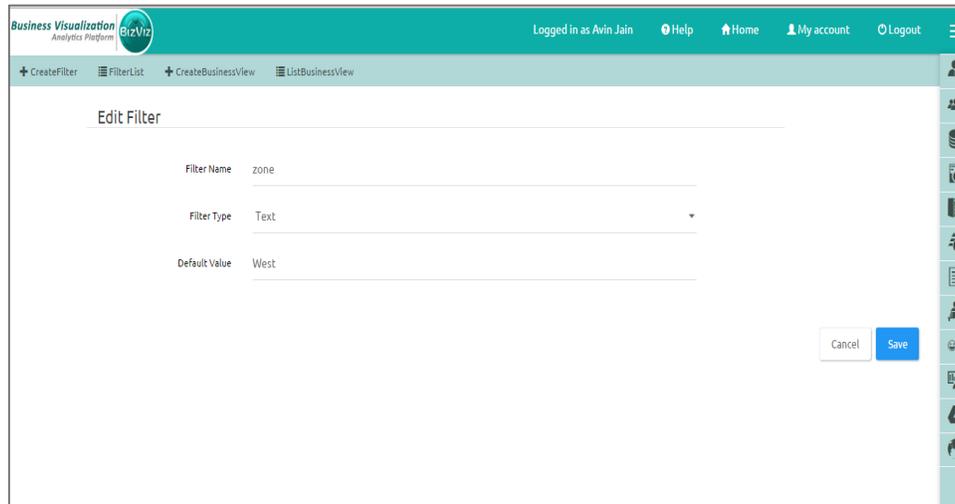
1. Click on **'Filter List'** option from the Business Views home screen
2. A list of all the previously created filters will be displayed with the below mentioned filter details:
  - a. Filter Name
  - b. Filter Values
  - c. Default Values
  - d. Created Date
  - e. Edit Icon
  - f. Delete Icon

### 5.2. Editing a Filter

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



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

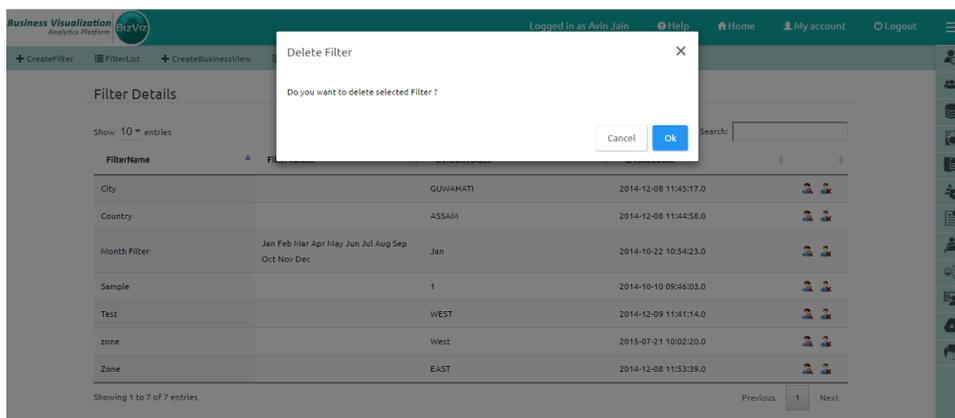


The screenshot shows the 'Edit Filter' interface. At the top, it says 'Business Visualization Analytics Platform' and 'Logged in as Avin Jain'. Below the header, there are navigation tabs: '+ CreateFilter', 'FilterList', '+ CreateBusinessView', and 'ListBusinessView'. The main content area is titled 'Edit Filter' and contains three input fields: 'Filter Name' with the value 'zone', 'Filter Type' with a dropdown menu showing 'Text', and 'Default Value' with the value 'West'. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

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'**



The screenshot shows the 'Filter List' screen with a 'Delete Filter' dialog box. The dialog box asks 'Do you want to delete selected Filter?' and has 'Cancel' and 'OK' buttons. The background shows a table of filters with the following data:

FilterName	City	Country	Month Filter	Sample	Test	zone	Zone
	GUWAHATI						
	ASSAM						
			Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec				
			Jan	1			
					WEST		
						West	
							EAST

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.