# **BizViz How-to-Guide**

## **Business Story**

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#### **1. Document Purpose**

The scope of this document is to guide users on how to create a business story. In order to create business story efficiently, it is recommended that users follow the step-by-step process given below.

#### 2. Prerequisites

#### 2.1. Software

- Browser that supports HTML5
- Operating System: Windows7

#### 2.2. Knowledge of BizViz Server

The user should have a basic understanding of the BizViz Server

#### 3. Step-by-Step Process

#### 3.1. Login to the Portal to access Data Management

- i) Enter in the URL bar http://www.bdibizviz.com/app//index.html
- ii) Enter your credentials to Login

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Password	
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	LOGIN
	Forgot your password

iii) Click on 'Login' to view the BizViz Portal Home Screen





#### 3.2. Steps to create a Cube

i) Click on 'Data Management'

(Menu>Data Management)



ii) After clicking on 'Data Management' button, a new web page will open.

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iii) Cubes can use data from a database connection or a flat file (ex. Excel).



- a. For Database Connection:
  - Click on ' <sup>+</sup> ' icon to create a new data connection
  - Select a data source from the dropdown list (Ex: MySQL)
  - Enter the following database credentials
    - Data connector Name: Name you wish to give the new cube
    - User Name: The 'User Name' used to connect to the database server
    - Password: The Password for the above given User Name
    - Description: (optional) A description of the database connection
    - IP: IP Address of the database server
    - **Port:** Port of the database server
    - Database Name: The name of the database where the data is stored

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#### Click 'Save'

- b. For Flat File Connection:
  - Click on to create a new data connection

Select 'File' from the drop-down menu, and then enter the following details:

- Data Connector Name: Name you wish to give the new cube
- Description: (optional) A description of the database connection

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• Click 'Save'.

iv) This newly created data connection will be listed under 'Data Connector'

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v) Select the newly created data connection (i.e. BDI Demo), and select 'Cube' at the

top of the screen, and then click on the + icon in order to create a cube.



Follow the given below phases

There are 4 phases when creating a cube:

- a. Getting Data
- b. Hierarchy definition
- c. Data Restrictions
- d. Schedule Data-refresh

The details of each phase is provided below:

- a. Getting Data: Enter the details of the cube
  - Cube Service Name: Name of the cube
  - Data Source Name: Data source name from which the cube is created
  - Database Name: Name of the database
  - **Query:** Define the query to retrieve the information which needs to be visualized in the story

Note: While defining a query, the table name should be passed in [] brackets.

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Click on the • arrow to move to the next phase.

b. 'Hierarchy Definition' Phase: Users can define a drill hierarchy here. (Ex: if drilling down in a report from Zone →State →City → CafeName is needed, the hierarchy can be defined here).

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This hierarchy is defined by simply dragging and dropping the dimension fields into the Hierarchy definition area in the desired order, as seen above.

Note: User can define a new field using the 'Add Field' option.

#### Add Field:

Users can create a new Dimension or Measure: (Each step has been numbered on the screen-image below)

- i) Click on 'Add Field'
- ii) Provide a name for the new field



iii) Select a function

iv) Click on the desired columns to add those column names to the functionv) Click on 'Create Field'

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Click on the  $\bigcirc$  arrow to move to the next phase.

**c. 'Data Restrictions' Phase:** (Optional)User based data restrictions can be defined here.

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Click on the  $\rightarrow$  arrow to move to the next phase.

**d. 'Schedule Data Refresh' Phase:** (Optional) Schedule Data Refresh can be used to set a regular interval for the cube to refresh automatically.



Click on the  $\checkmark$  icon will pop-up a message stating the cube is successfully created.

#### 3.3. Steps to Create a Business Story

i) Click on the 'Home' button (at the top of the screen) and right-click on an empty area of the portal home screen and select 'Create a Story' (as shown below).

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- ii) Enter the following details
  - Title: Name you wish to give to the Story
  - **Description:** (optional) A description of the story



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- iii) Click on 'Save'.
- iv) You will be directed to the following page:

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v) Under 'Select Data Source', a search bar is provided to search for the cube name we created earlier. On selecting a cube, all the dimensions and measures of that cube will be displayed.

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vi) Click on 'Next' (at the bottom of the screen) to create a story.

vii) Drag and Drop the desired Dimensions and Measures from the left side of the screen to the to '**Add Fields**' area (as shown below).



viii)Click on '**Save**' (at the top right of the screen). You will then be directed to the following page:



