

BizViz How-to-Guide

Business Story

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Table of Contents

- 1. Document Purpose 3
- 2. Prerequisites 3
 - 2.1. Software 3
 - 2.2. Knowledge of BizViz Server 3
- 3. Step-by-Step Process 3
 - 3.1. Login to the Portal to access Data Management 3
 - 3.2. Steps to create a Cube 4
 - 3.3. Steps to Create a Business Story 9



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

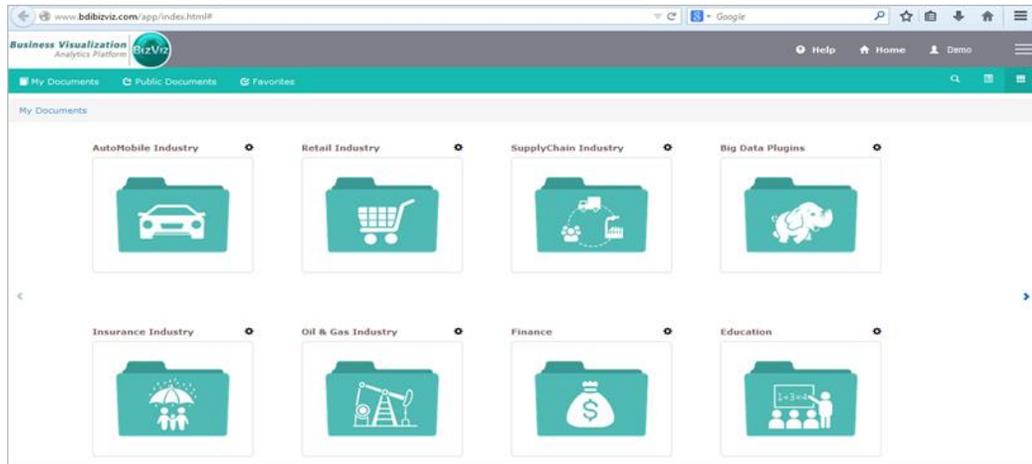
3. Step-by-Step Process

3.1. Login to the Portal to access Data Management

- Enter in the URL bar <http://www.bdbizviz.com/app//index.html>
- Enter your credentials to Login

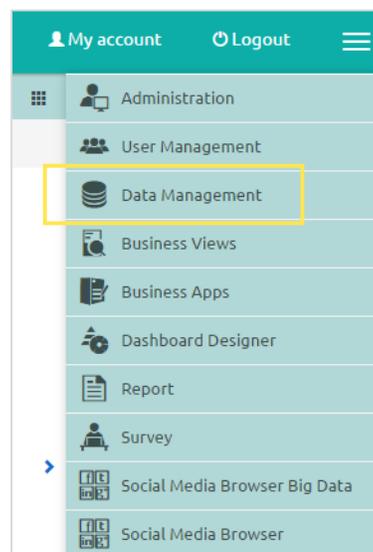
A screenshot of the BizViz login page. At the top center is the BizViz logo, a teal sphere with a white outline of a person's head and shoulders. Below the logo is a light gray rectangular form containing three input fields: "Email", "Password", and "Enterprise" (with a dropdown arrow). Below these fields is a teal "LOGIN" button. To the right of the button is a link that says "Forgot your password?". At the bottom of the form, it says "Copyrights © 2015 Big Data BizViz LLC".

- 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)



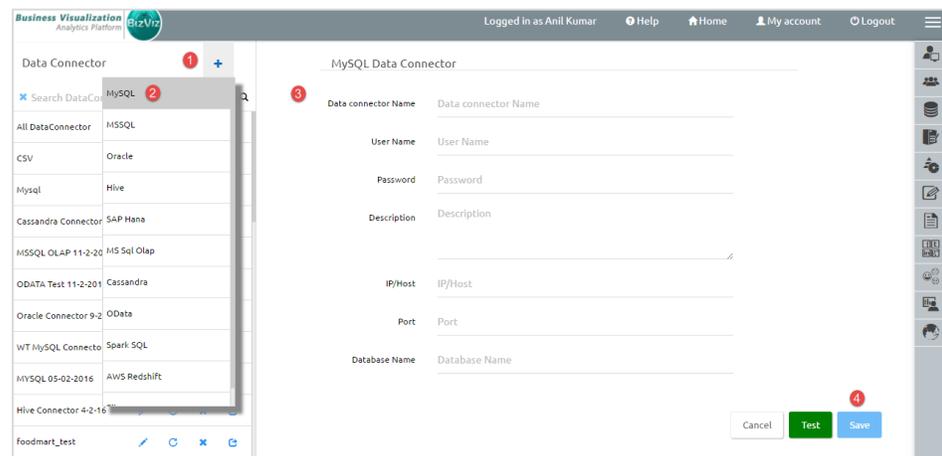
- ii) After clicking on 'Data Management' button, a new web page will open.



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

a. For Database Connection:

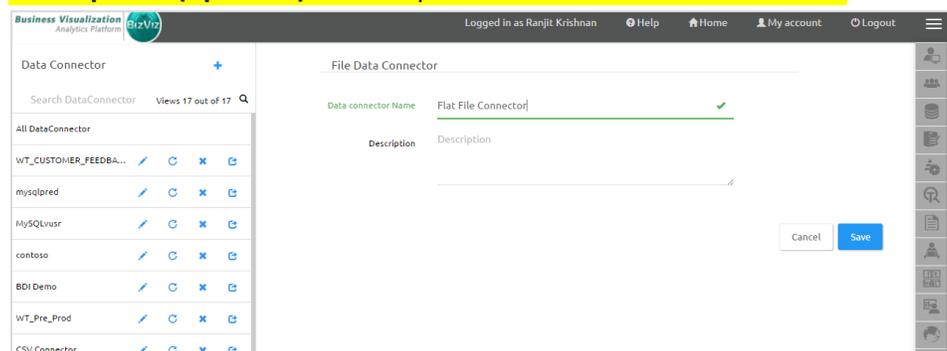
- Click on ' + ' icon to create a new data connection
- Select a data source from the dropdown list (Ex: MySQL)
- Enter the following database credentials
 - **Data connector Name:** Name you wish to give the new cube
 - **User Name:** The 'User Name' used to connect to the database server
 - **Password:** 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



- Click 'Save'

b. For Flat File Connection:

- Click on ' + ' icon 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

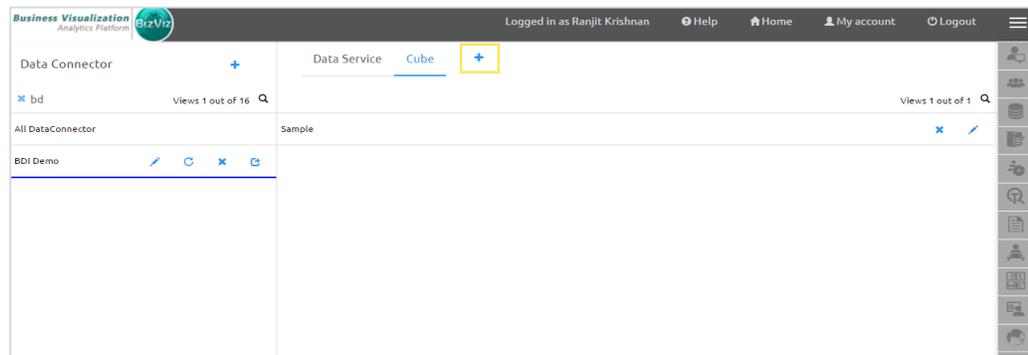


- Click 'Save'.

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



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

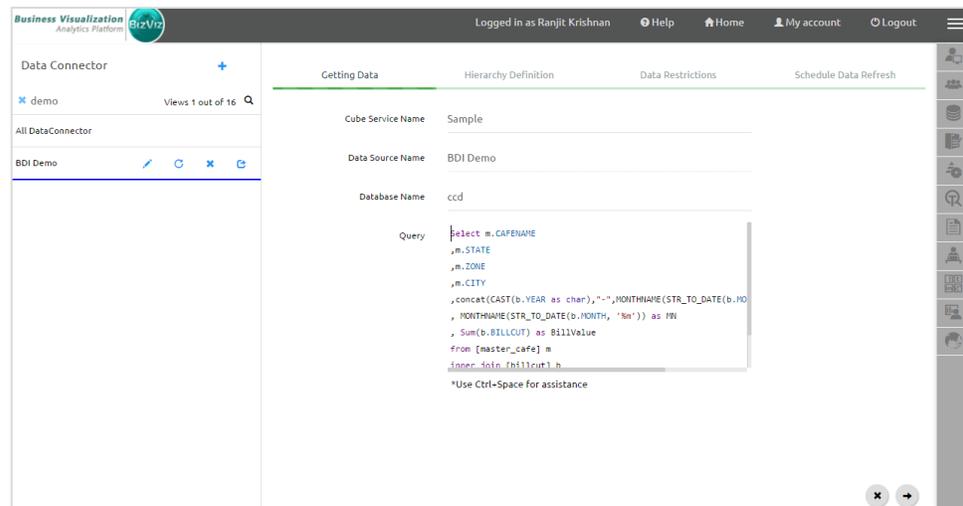
There are 4 phases when creating a cube:

- Getting Data
- Hierarchy definition
- Data Restrictions
- Schedule Data-refresh

The details of each phase is provided below:

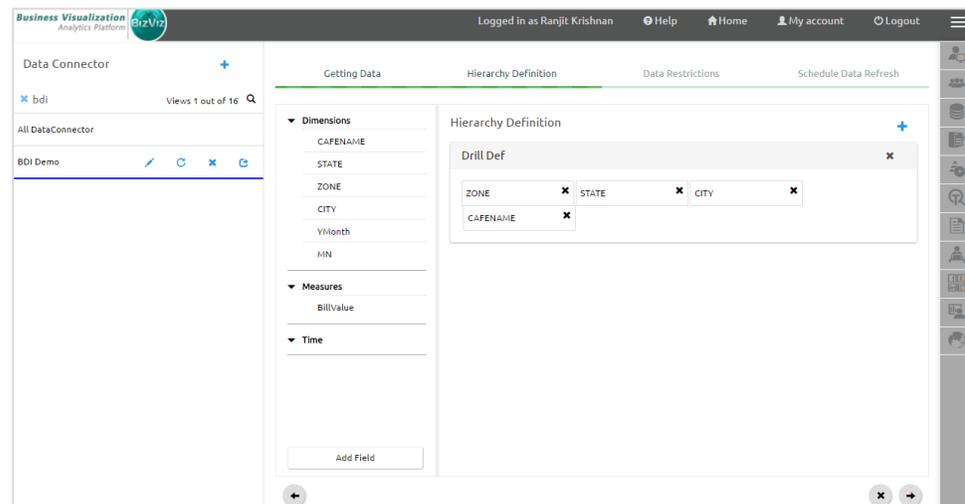
- Getting Data:** Enter the details of the cube
 - **Cube Service Name:** Name of the cube
 - **Data Source Name:** Data source name from which the cube is created
 - **Database Name:** Name of the database
 - **Query:** Define the query to retrieve the information which needs to be visualized in the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

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



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).



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

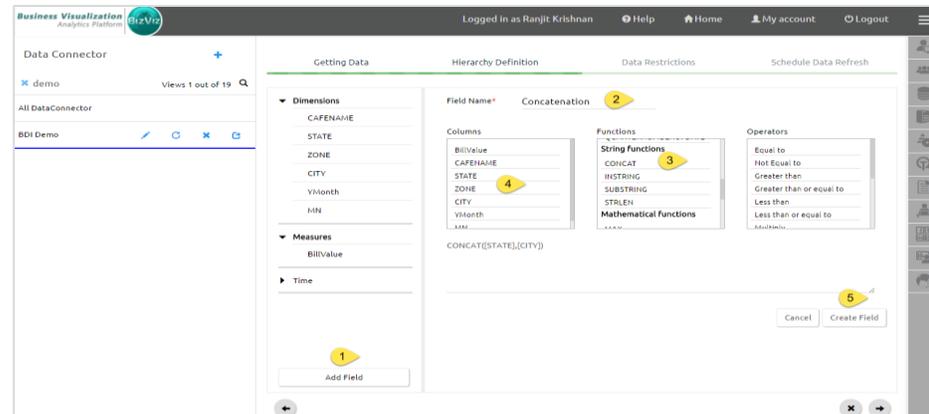
Note: User can define a new field using the 'Add Field' option.

Add Field:

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

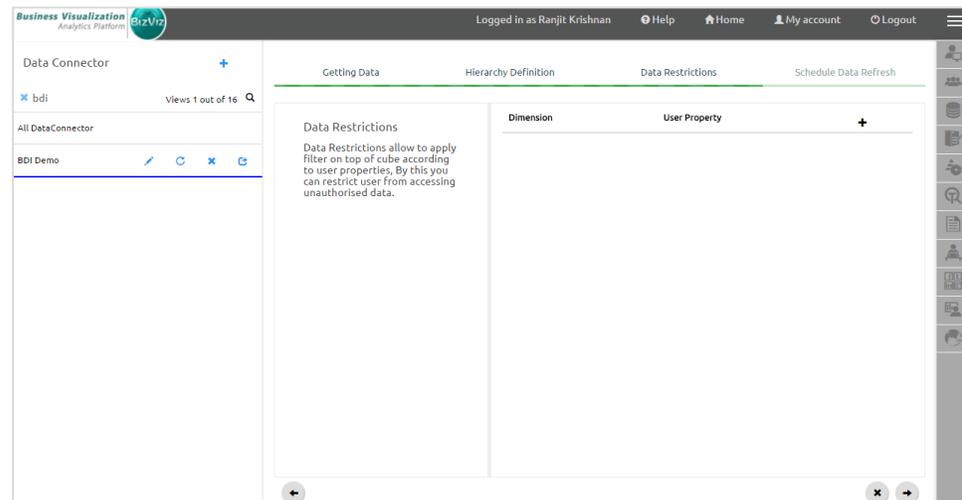
- i) Click on 'Add Field'
- ii) Provide a name for the new field

- iii) Select a function
- iv) Click on the desired columns to add those column names to the function
- v) Click on 'Create Field'



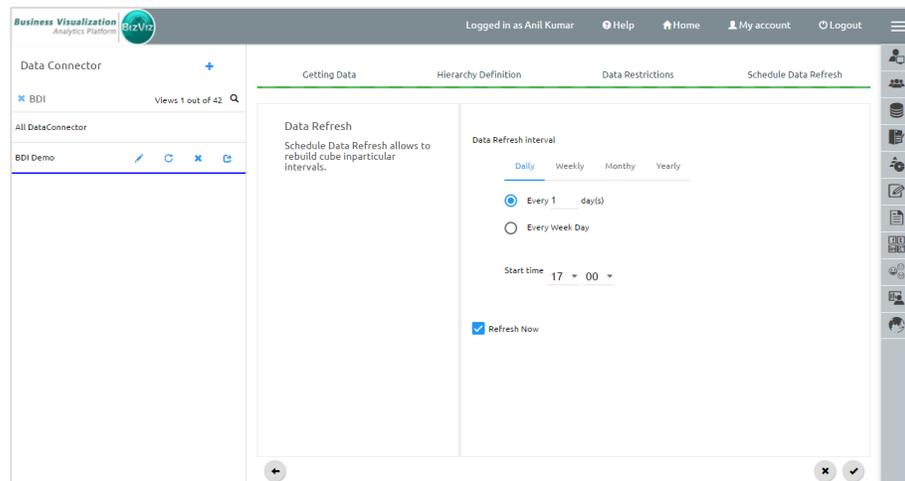
Click on the  arrow to move to the next phase.

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



Click on the  arrow to move to the next phase.

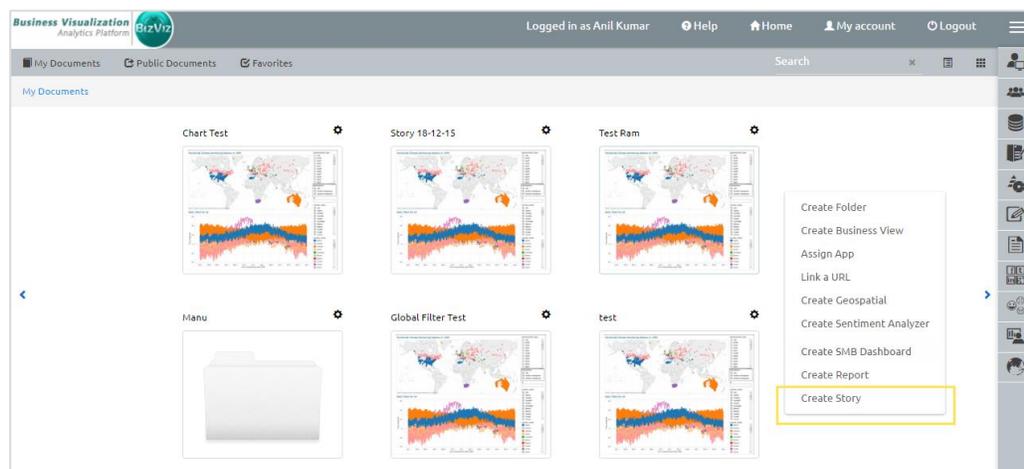
- d. **'Schedule Data Refresh' Phase:** (Optional) Schedule Data Refresh can be used to set a regular interval for the cube to refresh automatically.



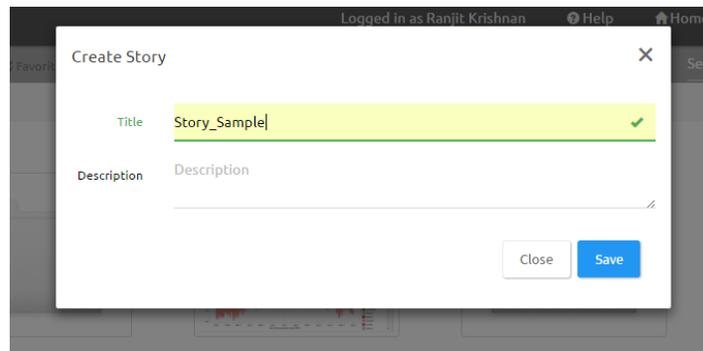
Click on the  icon will pop-up a message stating the cube is successfully created.

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).

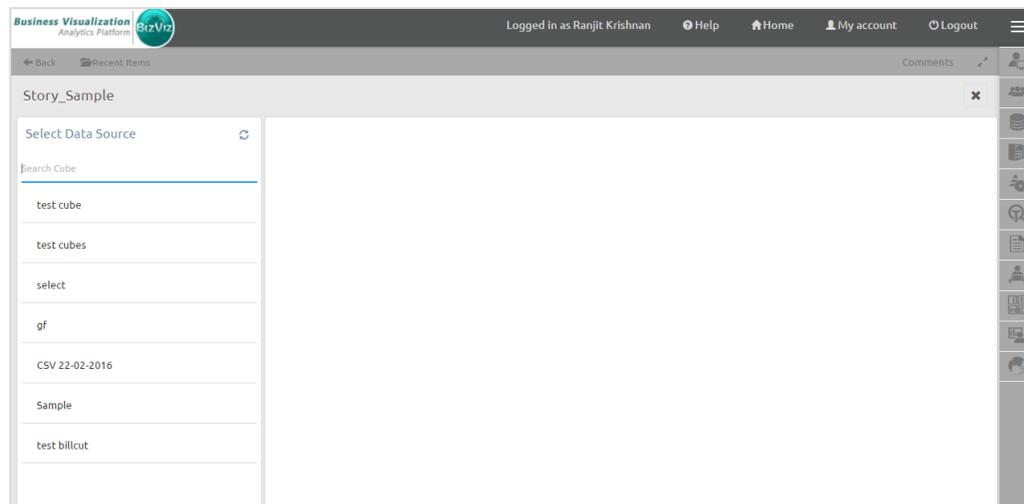


- ii) Enter the following details
 - **Title:** Name you wish to give to the Story
 - **Description:** (optional) A description of the story

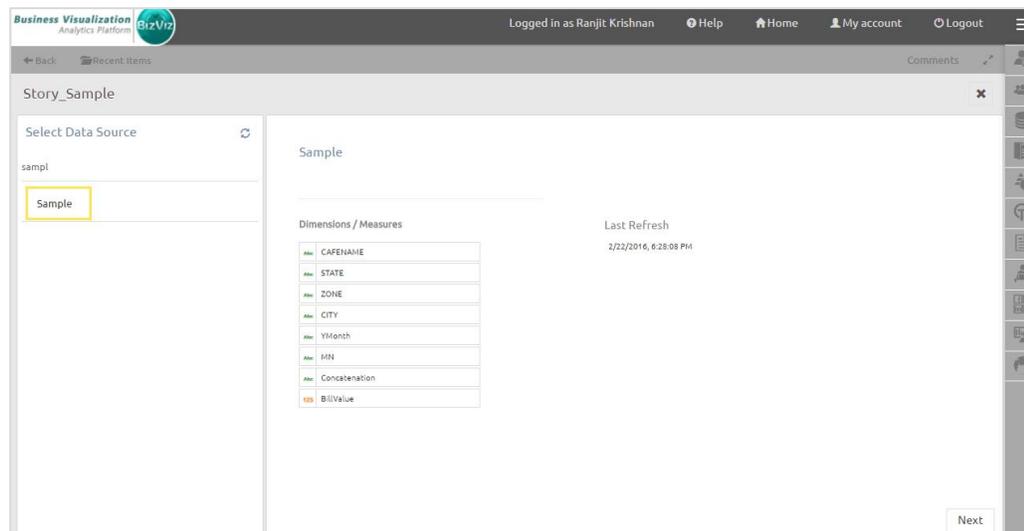


iii) Click on **'Save'**.

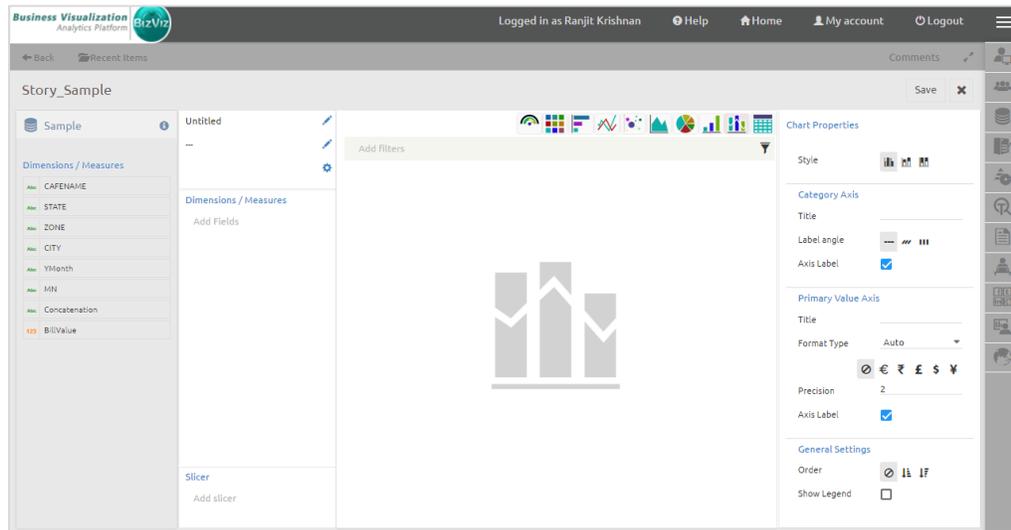
iv) You will be directed to the following page:



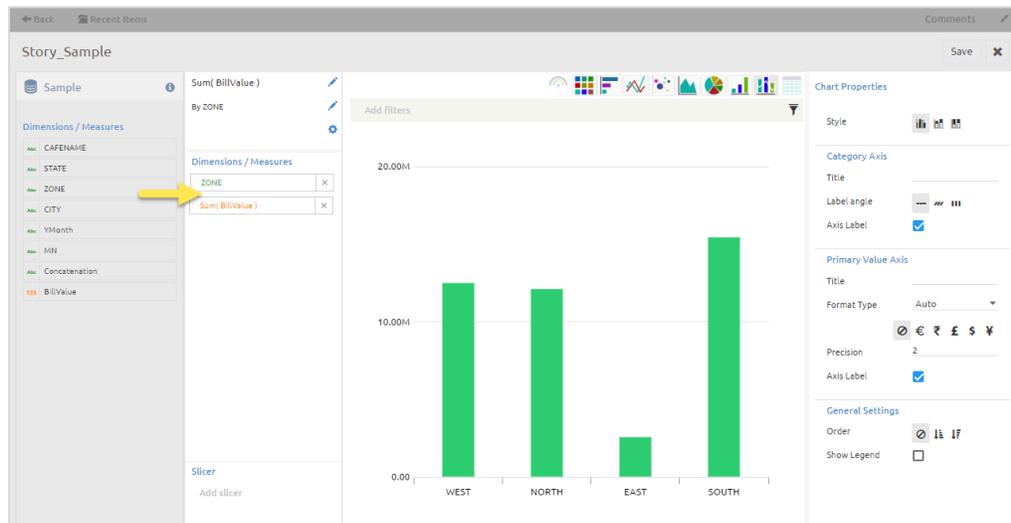
v) Under **'Select Data Source'**, a search bar is provided to search for the cube name we created earlier. On selecting a cube, all the dimensions and measures of that cube will be displayed.



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:

