

BizViz How-to-Guide

Dashboard Designer

Drill Down

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1. Document Purpose

The scope of this document is to guide users on how to implement drilldown action in dashboards. It is recommended that users follow the step-by-step process given below.

2. Prerequisites

2.1. Software

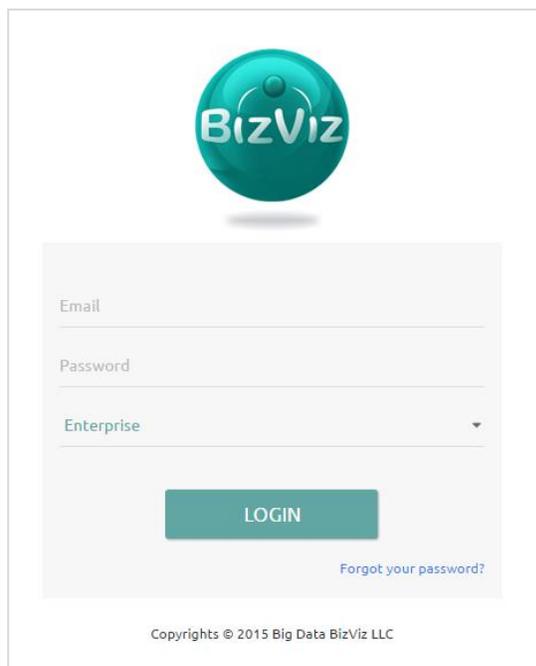
- Browser that supports HTML5
- Operating System: Windows 7

2.2. Basic understanding of the BizViz Server

3. Step-by-Step Process

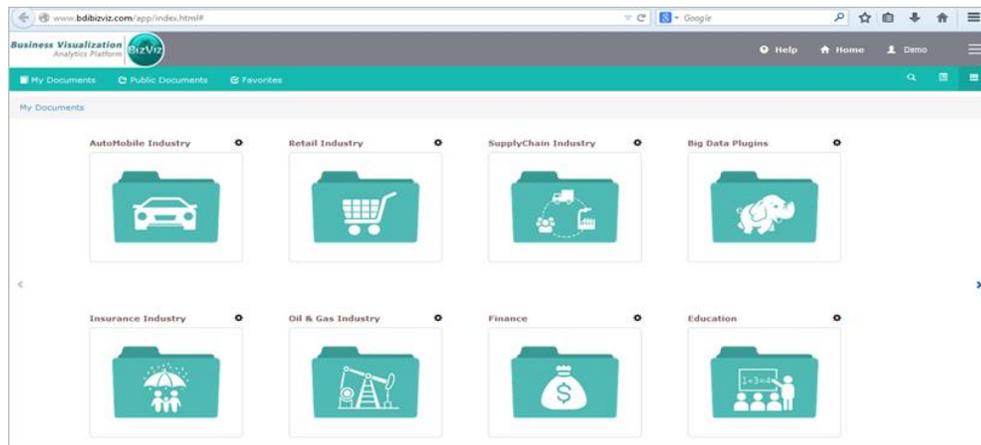
3.1. Login to the BizViz Portal

- In the URL bar, enter → <http://apps.bdbizviz.com/app/index.html>
- Enter your credentials to Login

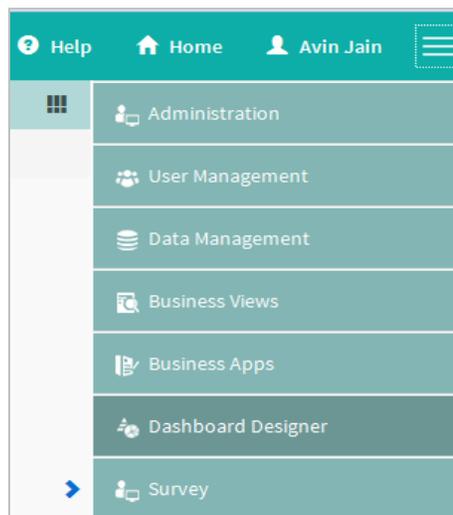


The screenshot shows the BizViz login interface. At the top center is the BizViz logo, a teal sphere with the text 'BizViz' in white. Below the logo is a light gray login form with the following elements: an 'Email' input field, a 'Password' input field, a dropdown menu currently set to 'Enterprise', a teal 'LOGIN' button, and a blue link for '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



iv) Click on the 'Menu'  button to display a list of the installed applications.

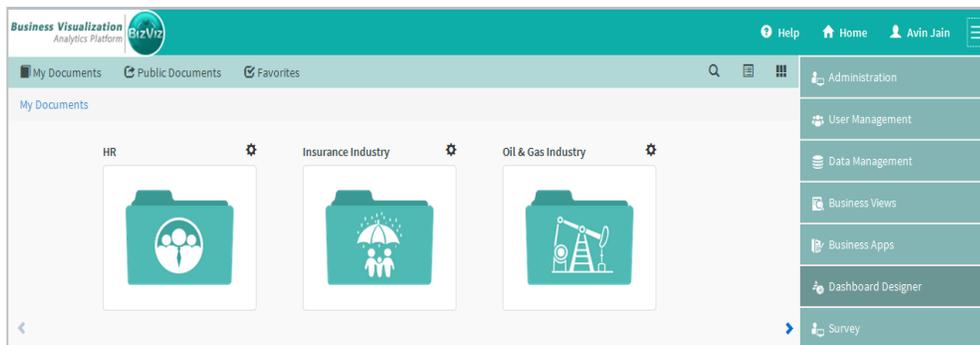


v) Click on the 'Dashboard Designer' plug-in as shown above.

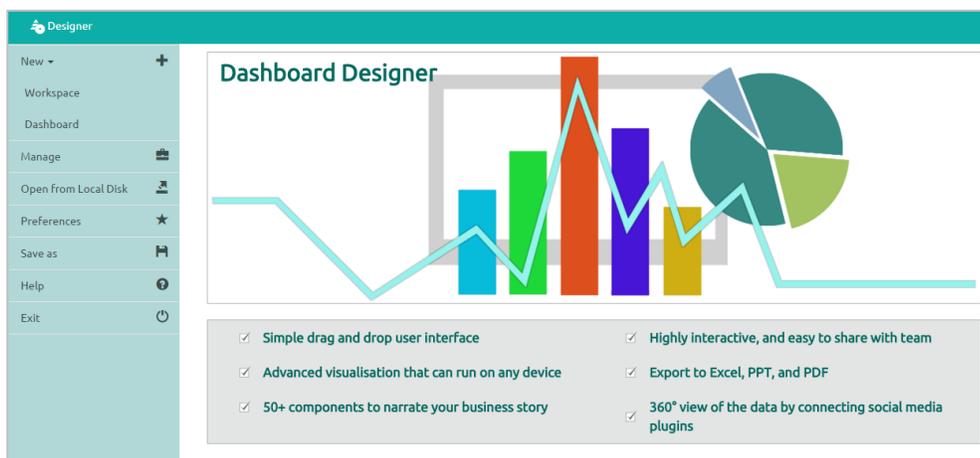
3.2. Creating Data Source Connections for Charts

i) Go to the Dashboard Designer Home Screen, as shown below.

From the Apps drop-down menu, select Dashboard Designer.



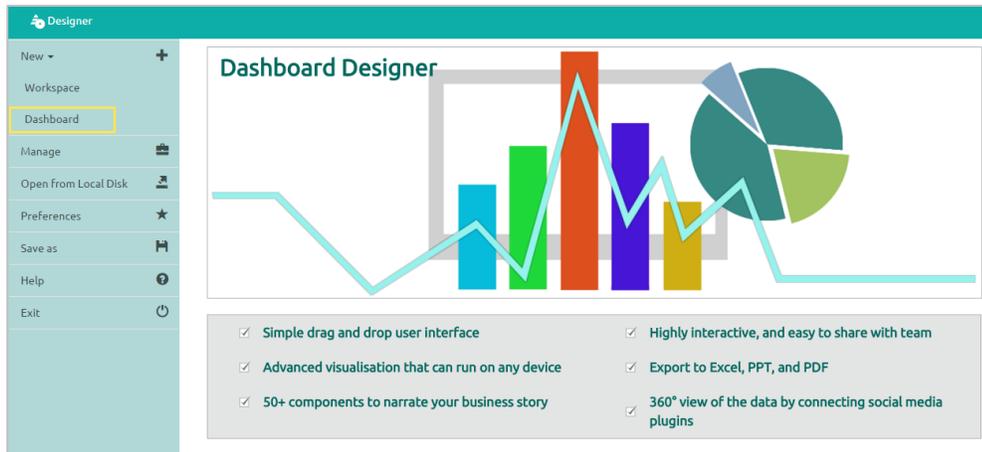
ii) After Selecting **‘Dashboard Designer’**, a web page will open in a new window



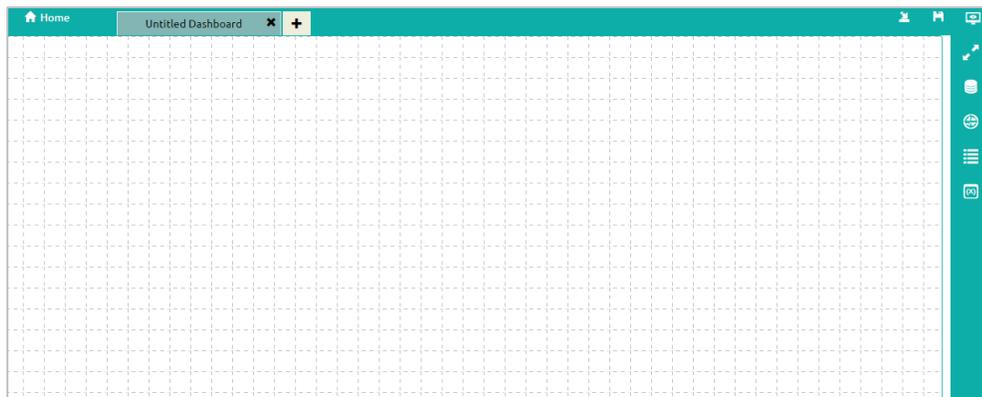
iii) Click on the **‘New +’** drop-down menu. You will be presented with 2 options:

- **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



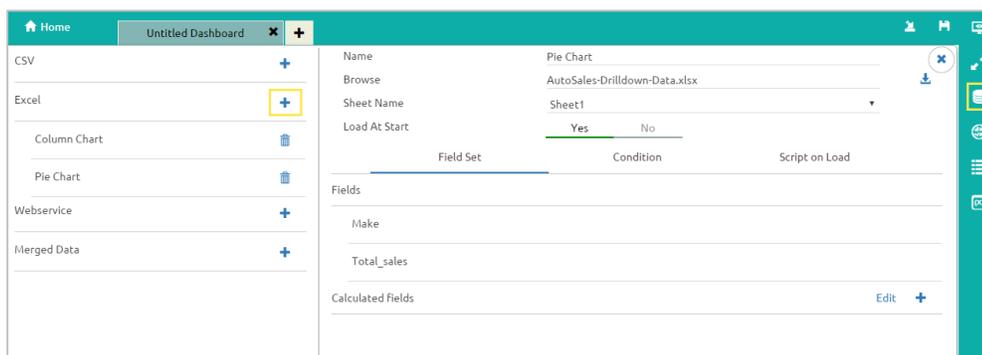
v) After Clicking on the ‘Dashboard’ button, a web page will open.



vi) Click on ‘Data source’ icon  provided on the right side of the canvas, and view the database connectivity options (ex: CSV, Excel, and Web-Service)

vii)

viii) Click on the  icon to create a new connection. In this tutorial we are selecting an Excel data connection.



Note: As we are performing drill-down from a Pie-chart to a Column chart, we have created two data sources (i.e. Pie and Column)

Fill in the necessary details

- **Name:** Name the connection
- **Browse:** Navigate to the Excel file that you wish to use as a data-source
- **Sheet Name:** Select the sheet you wish to use from the Excel file you have selected
- **Load at Start:** Enabling this option refreshes the data-source before opening the charts

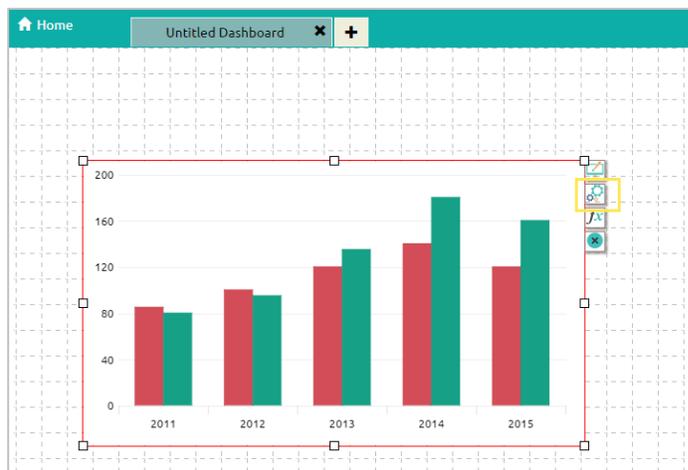
ix) Click on 'Charts'  icon provided at right side to the canvas

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

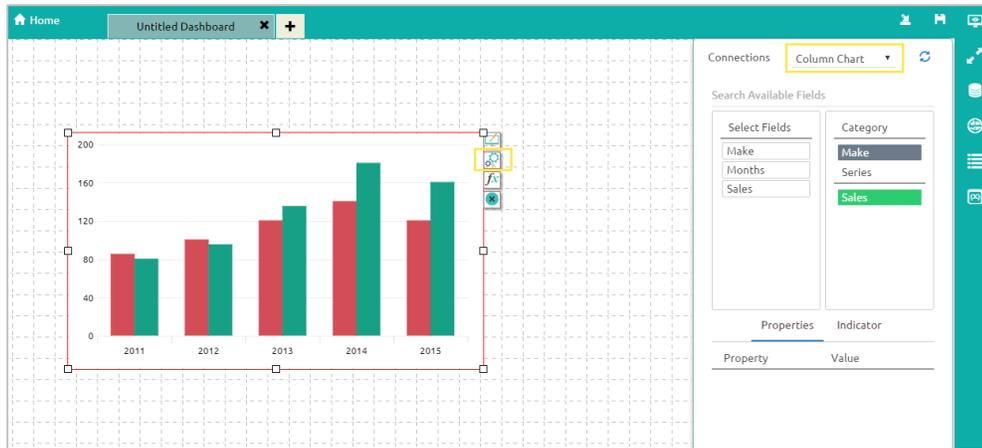


x) Connecting the Column chart component to an existing data connection:

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

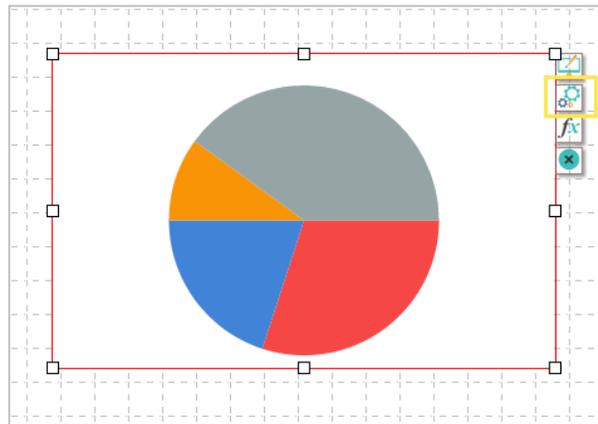


- Select the connection from the **'Connections'** dropdown (Ex: Column)
- Drag and drop the fields to their respected series and categories.

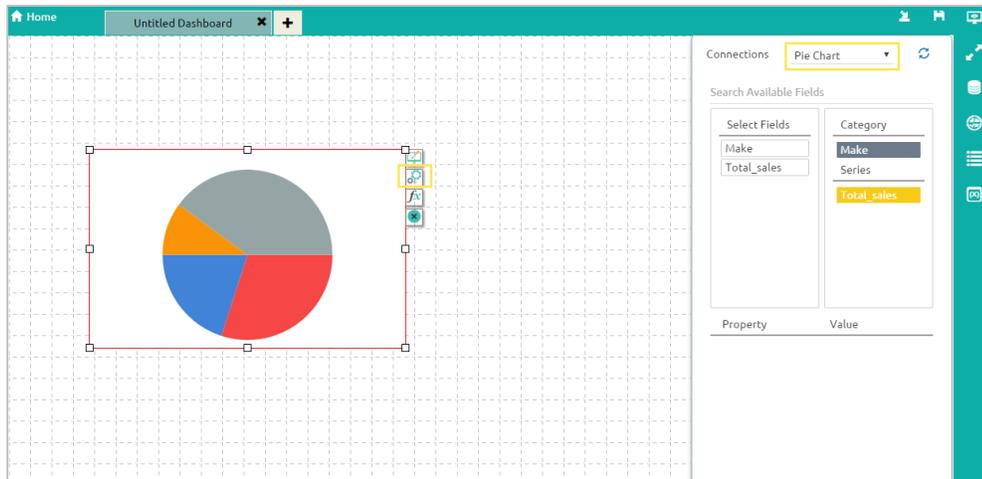


xi) Connecting the Pie chart to an existing data connection:

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

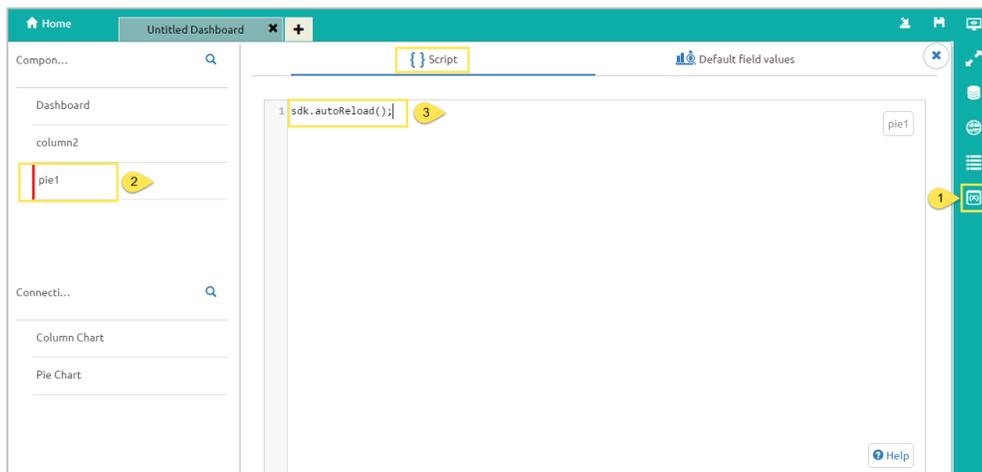


- Select a connection from the **'Connections'** dropdown (Ex: Pie)
- Drag and drop the fields to their respected series and categories.



3.3. Enabling Drilldown Option

- i) Click on '**Component Attributes**' icon  provided on the right side of canvas and select the '**Pie1**' component, as shown in below

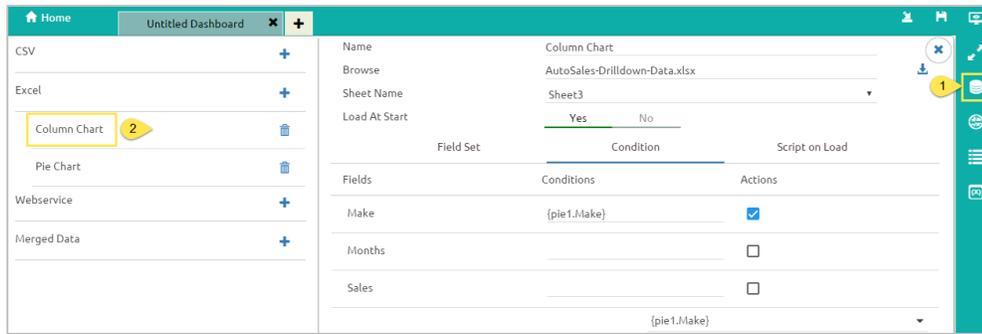


Apply these actions:

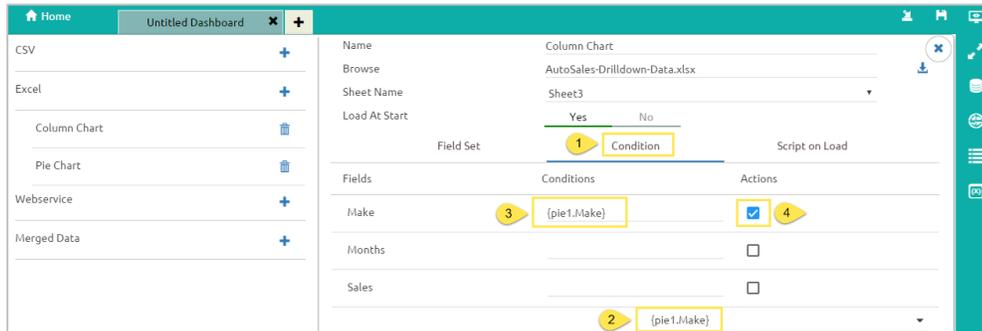
- Type the function name as shown in the above figure
- To name the function:

Type SDK. Press '**Ctrl+SPACE**' keys to select a particular function from the pop-up list

- ii) Select  icon and click on the '**Column Chart**' component as shown below

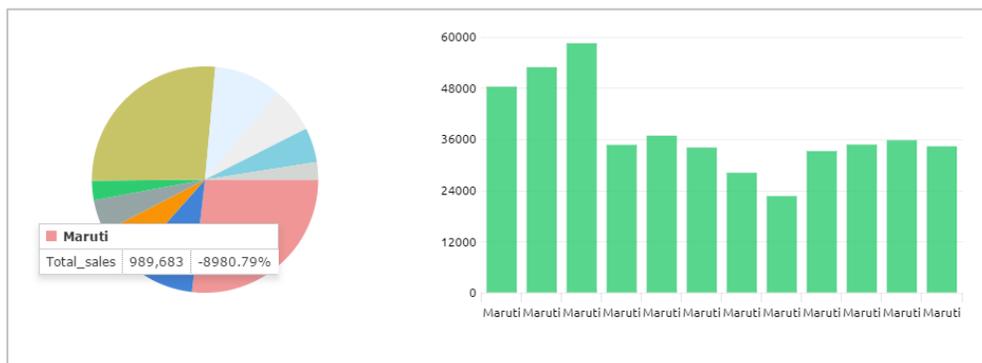


iii) Select the **'Condition'** button and in **'Search Available Conditions'** type the name of the field that will be used to perform filtering (i.e. in this example, we are using the **'Make'** field to perform a drill down).



iv) Copy the condition and paste it under **'Condition'** and enable the **'Action'** checkbox. (as shown in above)

v) Click on the **'Preview'**  button to perform a drilldown operation.



In the above figure, we see that when clicking the **'Maruti'** option in the Pie-chart, all sales information for that automobile make is filtered in the column chart.