BizViz How-to-Guide

Dashboard Designer

Merge Data

Release :   2.0

Date :   Feb. 24, 2016

Table of Contents

Copyright © 2015. Big Data BizViz LLC. All Rights Reserved

1. Document Purpose

The scope of this document is to guide users on how to use the merge data option in the dashboard designer. In order to use the merge data option efficiently, it is recommended that users follow the step-by-step process given below.

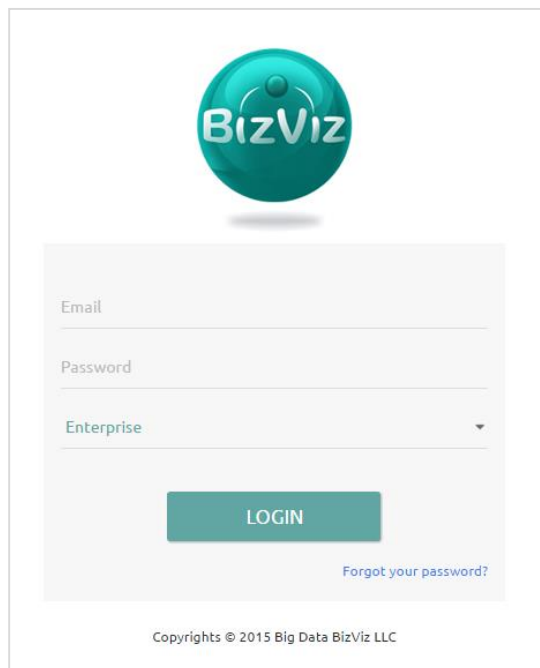# 2. Prerequisites

2.1. Software

- Browser that supports HTML5
- Operating System: Windows 7
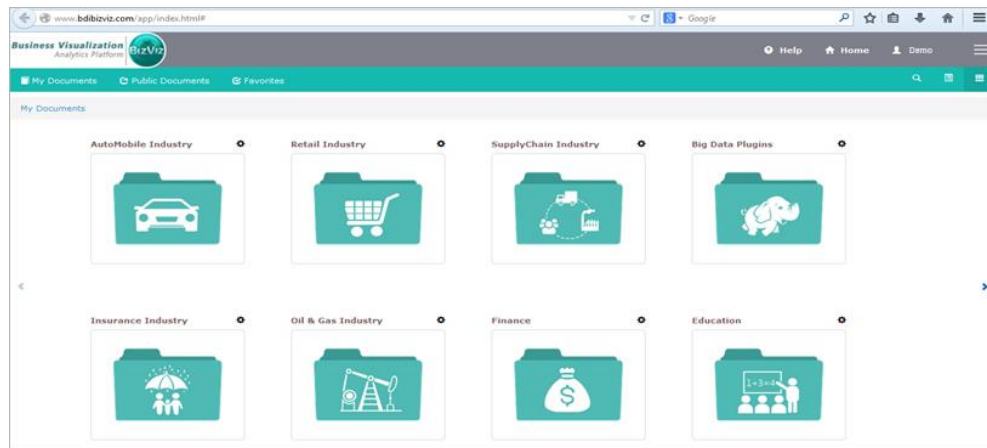
2.2. Basic understanding of the BizViz Server

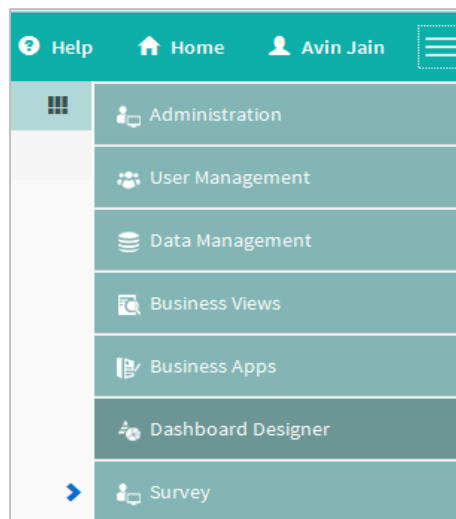# 3. Step-by-Step Process

3.1. Login to the BizViz Portal

i)   In the URL bar, enter → http://apps.bdbizviz.com/app/index.html

ii) Enter your credentials to Login

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

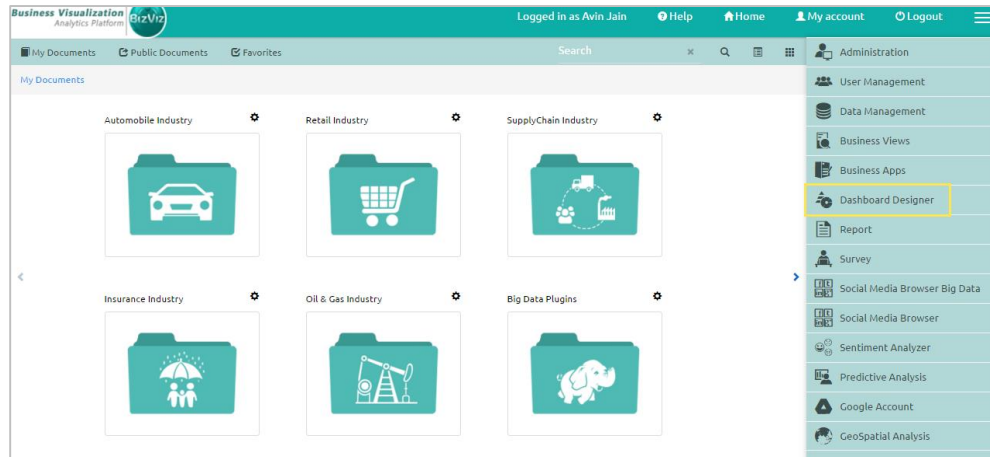iv) Click on the '**Menu**' ☰ button to display a list of the installed applications.

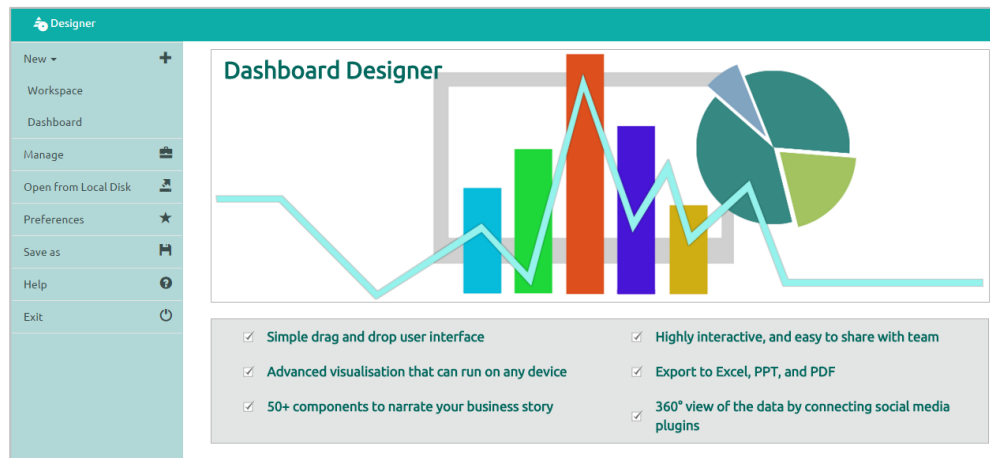v) Click on the '**Dashboard Designer**' plug-in, as shown above.

3.2. Steps to Create an Excel Data Connection

i) Click on '**Dashboard Designer**'

Menu > Dashboard Designer

ii) After Clicking on the '**Dashboard Designer**' button, a web page will open in a new window.
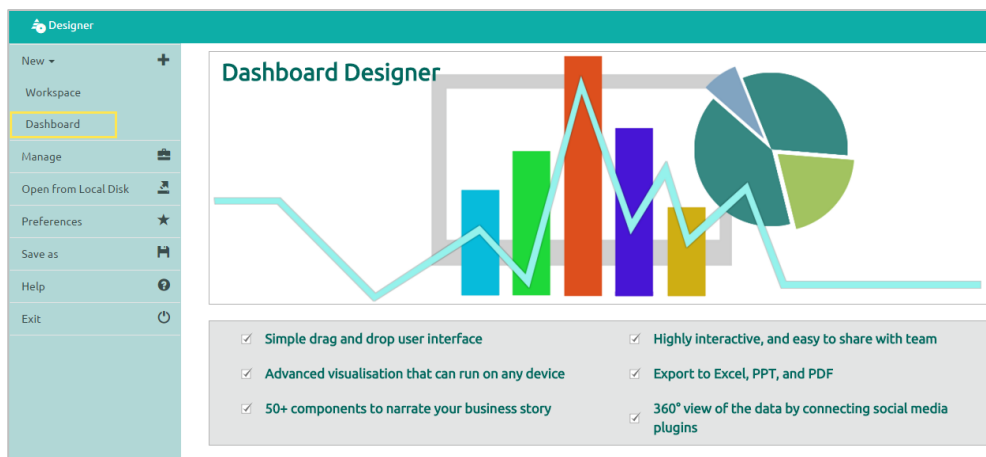

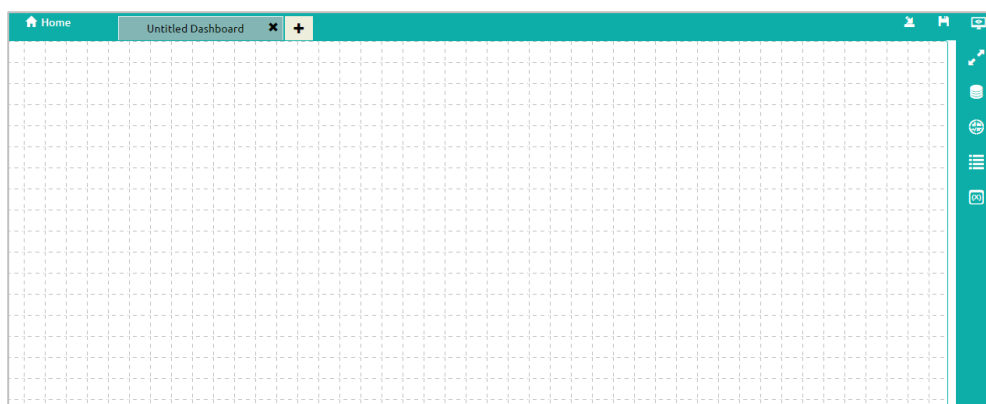iii) Click on the '**New +**' icon to create as, as shown below.
- **Workspace**: A place holder for previously created dashboards.
- **Dashboard**: A place where design and development of dashboards takes place.

iv) Click on '**Dashboard**' to create a dashboard
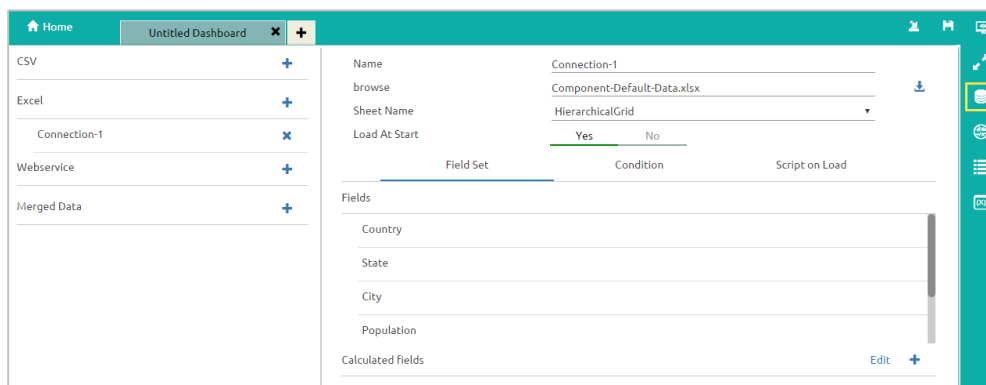
New+ > Dashboard

v) After Clicking on the '**Dashboard**' button, a web page will open in a new window.

vi) Click on '**Data source**' icon provided to the right side of canvas, and view the database connectivity options. (**Ex**: CSV, Excel, and Web-Service)

vii) Click on the icon to create a new connection. In this tutorial, we will select the Excel data connection.
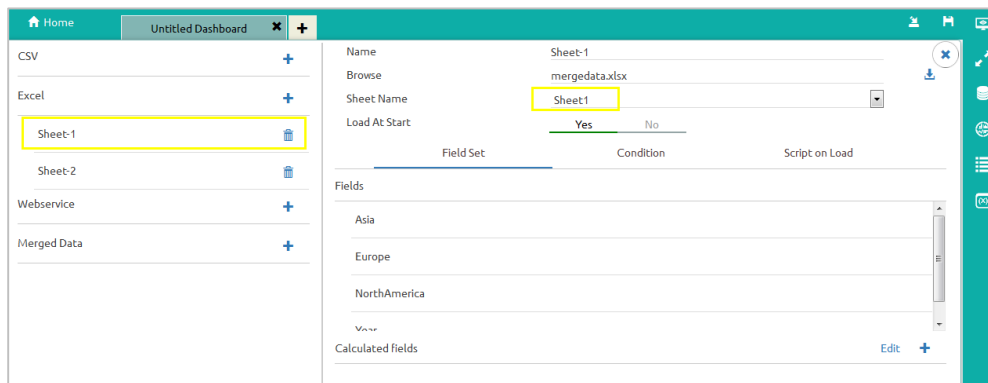

6

Fill in the necessary details:

- **Name:** Name the connection
- **Browse:** Navigate to the data file you wish to use
- **Sheet Name:** Select a datasheet from the select workbook
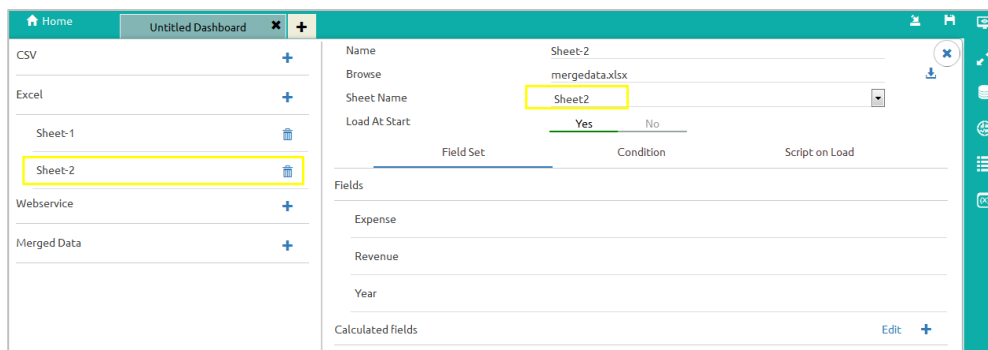- **Load at Start:** Enabling this option causes the data to be updated before loading into the charts.

Note: Create two Excel data connections.

viii) For '**Connection-1**', select '**Sheet 1**' datasheet available in the Excel workbook, and for '**Connection-2**', select '**Sheet-2**' datasheet
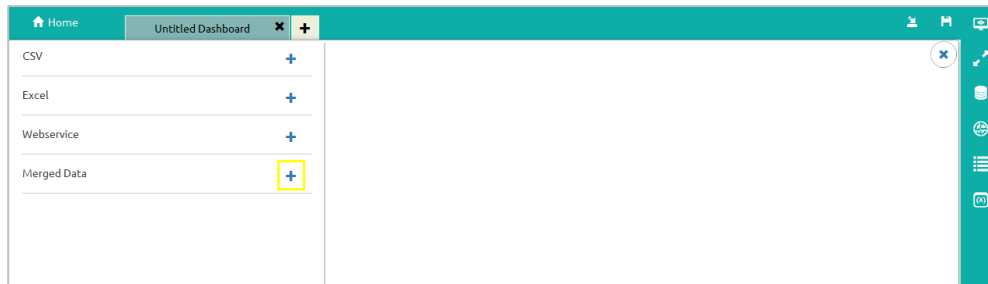
Connection-1:
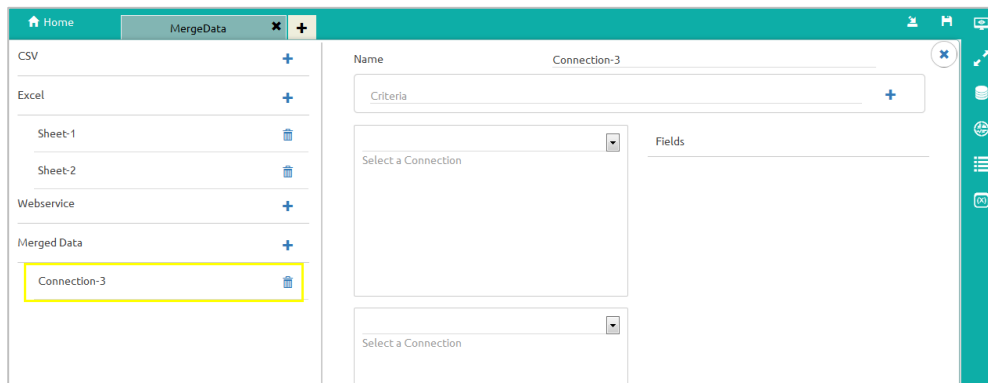

Connection-2:

Note: In order to use the Merge Data option, there should be a common column name in the uploaded files

3.3. Steps to Create Merge Data Connection

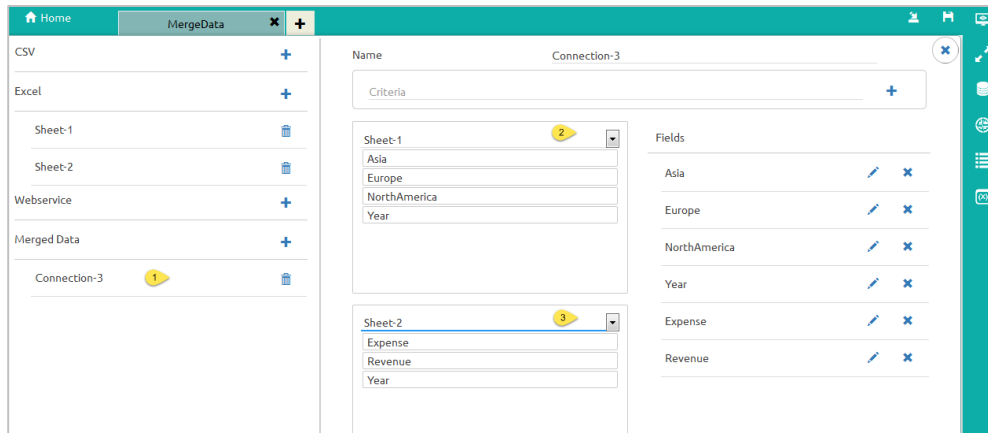i) Click on the ' + ' icon that is available next to the '**Merge Data**' option

7

ii) As we need to merge data from two Excel connections (**Sheet-1** and **Sheet-2**), we will need to create a connection under the '**Merge Data**' Option
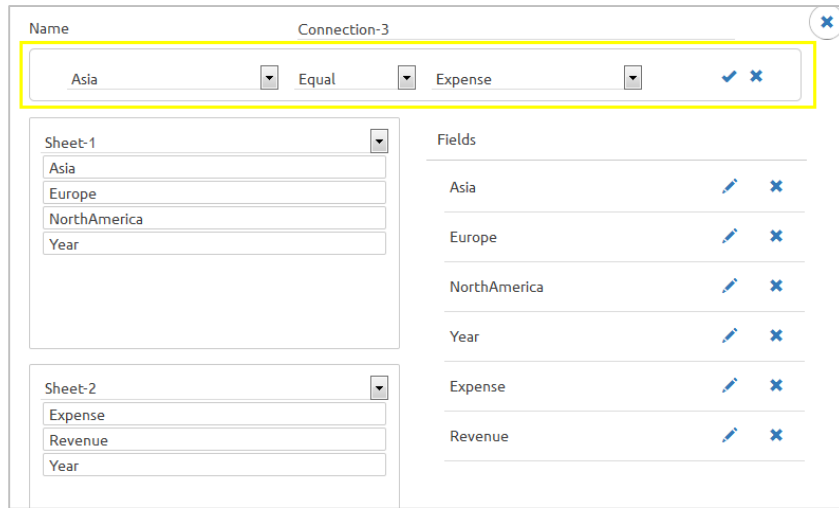

iii) Follow the below steps:
- Select '**Connection—3**'
- In the Parent connection dropdown menu, select '**Sheet-1**'
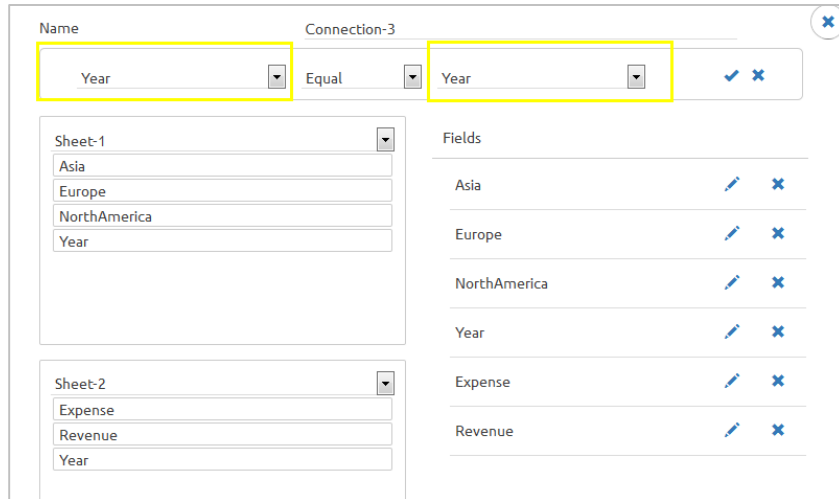- In the Child connection dropdown menu, select '**Sheet-2**'

Note: After creating the connection under '**Merge Data**', define a condition to join the data (Sheet-1 and Sheet-2)
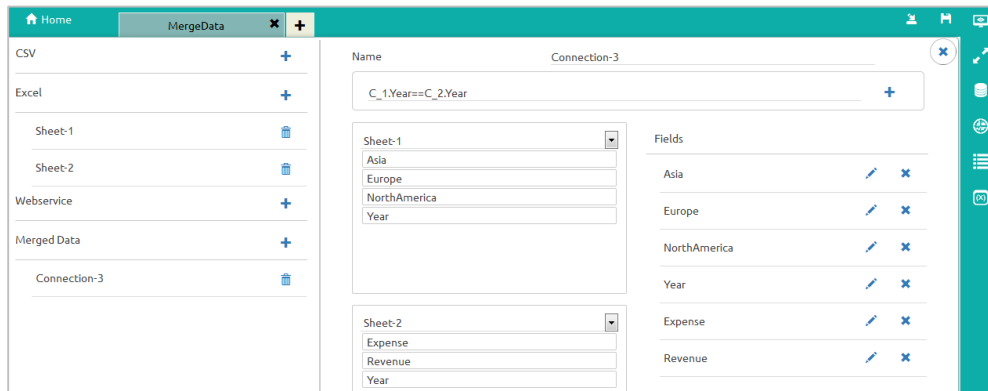
iv) Click on the ✛ icon which is located next to the '**Criteria**'.

v) Clicking on the ✛ will display the columns available under the created connections.

8

vi) Select the common column available in the created connections (i.e. **Year**).

vii) Click on the ' ✔ ' icon to save the created condition.

viii) The columns from the both sheets will be combined under '**Connection-3**'.

9