BizViz How-to-Guide

Dashboard Designer Web Services Connection

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BizViz

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1. Document Purpose

The scope of this document is to guide users on how to create dashboards using Web-Service connection. In order to create dashboards 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 \rightarrow <u>http://apps.bdbizviz.com/app/index.html</u>
- ii) Enter your credentials to Login

	0
B	ZVIZ
Email	
Password	
Enterprise	
	LOGIN
	Forgot your password

iii) Click on ' ${\rm Login'}$ to view the BizViz Portal Home Screen



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



v) Click on 'Dashboard Designer', as shown above.

3.2. Steps to Create Dashboard

i) Click on 'Dashboard Designer'

Menu > Dashboard Designer

Business Visualiza Analytics Pla	ation BIZVIZ				Logged in as Avin Jain	🕑 Help		Home	,	My account	🖒 Logout	=
My Documents	C Public Documents	🕑 Favorites			Search	3	(O	. 🗉		Administ	tration	
My Documents										user Ma	nagement	
	Automobile Industry	0	Retail Industry	0	SupplyChain Industry	¢				🛢 Data Ma	nagement	
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										Prediction	ve Analysis	
										🛆 Google	Account	
										🧑 GeoSpat	ial Analysis	

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



iii) Click on 'New +' icon to create a workspace, as shown below.

- Workspace: Previously created dashboards are listed here
- Dashboard: Area to be used for dashboard design and development

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.

☆ Home Untitled Dashboard ★ +	¥ M 👳

- 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.

🔒 Home	Untitled Dashboard	× +						а н	ē
CSV		+	Name	Sample				×) 🦯
			Data Source	BDI Internal (Data		Ŧ		
Excel		+	Services	Year_Rev			Ŧ		
Webservice			Load At Start	Yes	No	_			۲
webservice	+		Timely Refresh	Yes No		-			
Sample		â	Field Set	C	ondition	Script on Load			≡
Merged Data		+	Fields						
			year						
			Calculated fields				Edit	+	

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Fill in the necessary details:

- Name: Name the connection
- Data Sources: Select the Data Source from the list (all data-sources created in Data-Management will be listed here)
- Services: Select a query name from the list (all the queries available under databases will be listed here)
- Load at Start: If this option is enabled, data will be updated before the chart is loaded
- Timely Refresh: Data will be updated at specified intervals
- Field Set: Fields available in the uploaded file will be displayed
- **Condition:** Fields used as filters in the query will be displayed here. This is applicable when a connection is made using web service.
- Script on Load: Scripts can be written to trigger a function.

viii) Click on the 'Charts' icon provided to the right of the canvas.



Drag and drop the BoxPlot chart onto the canvas

ix) Connect the BoxPlot chart to the created data connection (i.e. Sample) Click on the settings icon that appears next to the chart.





- Select the connection from the 'Connections' dropdown list. (Ex: Sample)
- Drag and drop the respective fields to series.



x) Click on 'Preview' to view the results

