

# BizViz How-to-Guide

## Dashboard Designer Excel Data Connection

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## 1. Document Purpose

The scope of this document is to guide users on how to create dashboards using MS-Excel data 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

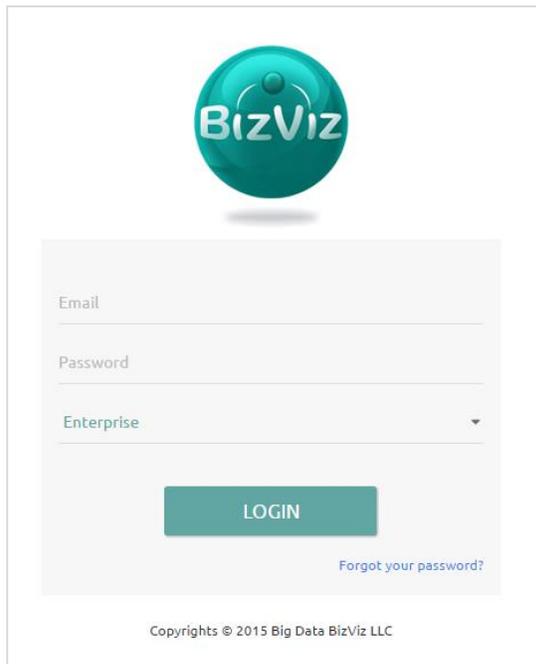
- Browser that supports HTML5
- Operating System: Windows 7

### 2.2. Basic understanding of the BizViz Server

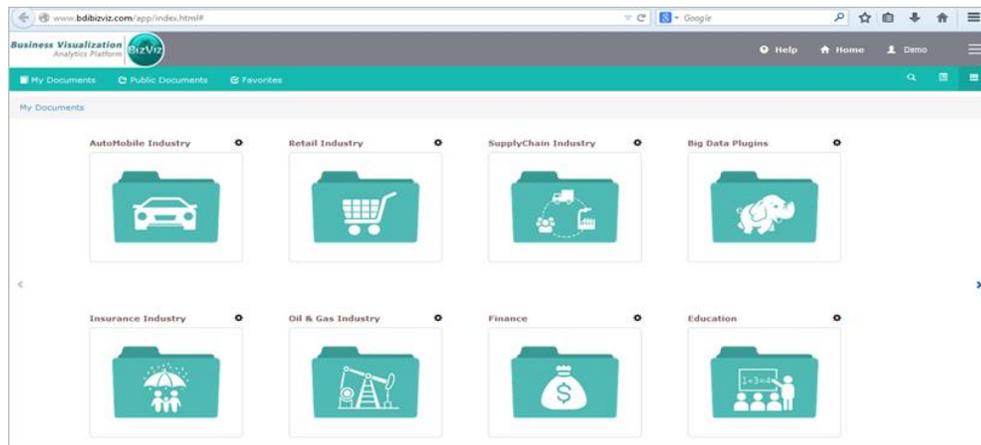
## 3. Step-by-Step Process

### 3.1. Login to the BizViz Portal

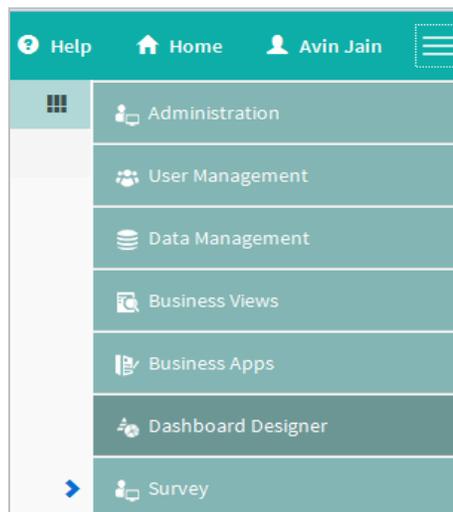
- In the URL bar, enter → <http://apps.bdbizviz.com/app/index.html>
- Enter your credentials to Login



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



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

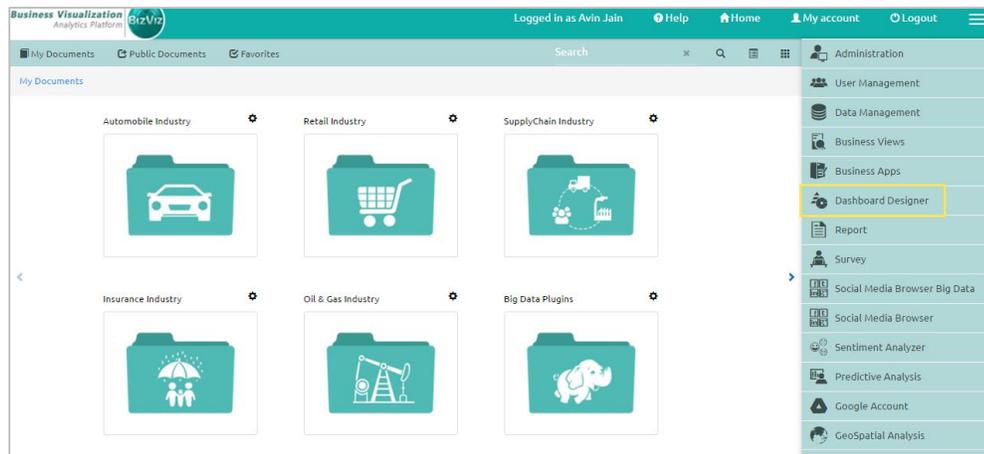


v) Click on the 'Dashboard Designer' plug-in as shown above.

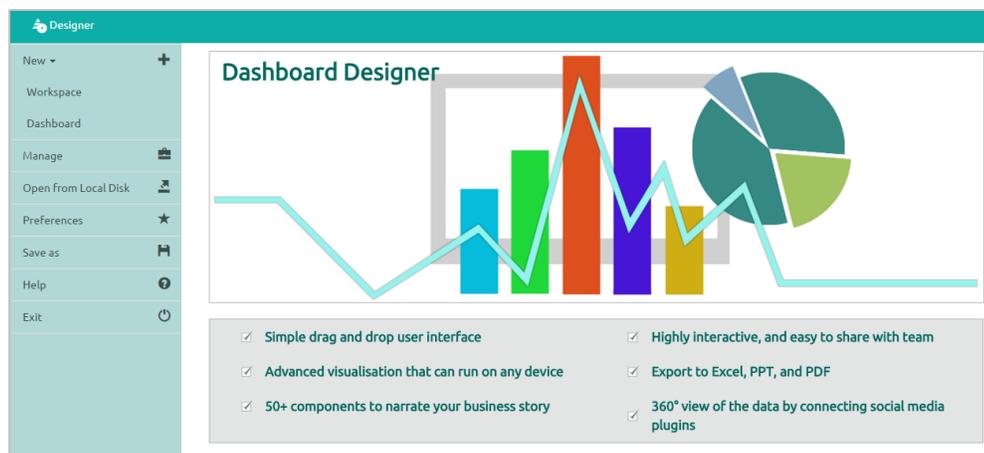
### 3.2. Steps to Create an Excel Data Connection

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.

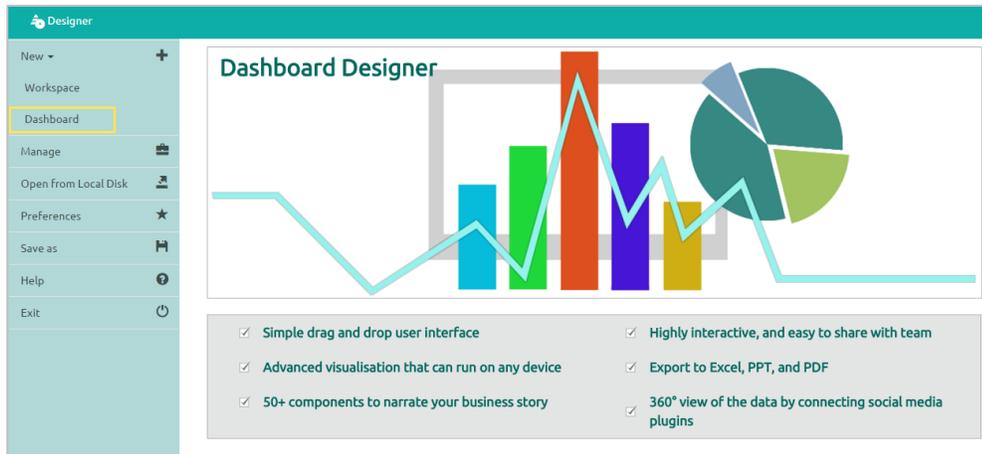


iii) Click on ‘**New +**’ icon to create a workspace as shown below.

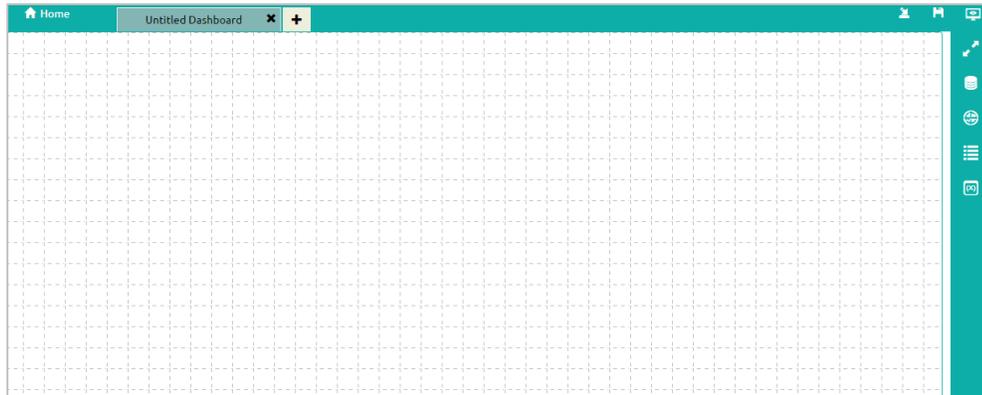
- **Workspace:** A place holder for previously created dashboards.
- **Dashboard:** A place where design and development of dashboards takes place.

iv) Click on ‘**Dashboard**’ to create a dashboard

**New+ > Dashboard**

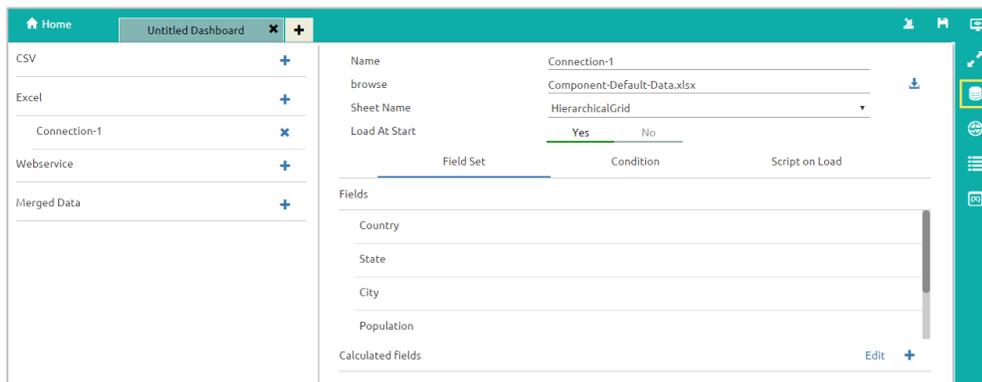


v) After Clicking on the ‘**Dashboard**’ button, a web page will open in a new window.



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  icon to create a new connection. In this tutorial we will be using an Excel data connection.

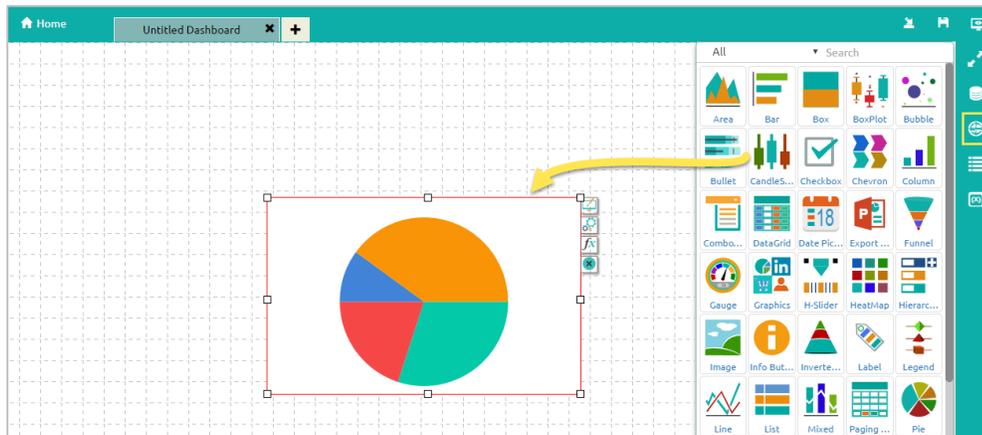


Fill in the necessary details:

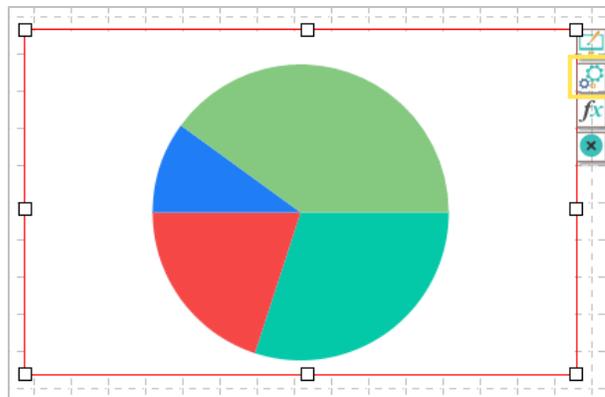
- **Name:** Name the connection
- **Browse:** Navigate to select the data file to be used
- **Sheet Name:** Select a datasheet from the workbook
- **Load at Start:** Enabling this option updates the data before loading it into the charts.

viii) Click on the **'Charts'** icon provided at right side to the canvas.

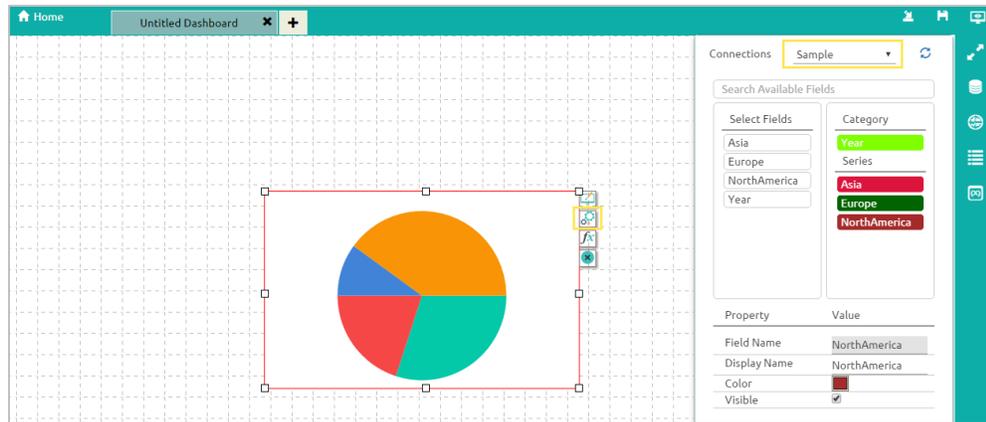
- Drag and Drop a Pie-Chart onto the canvas



ix) Connect a Pie chart to the created data connection (i.e. **Pie**)



- Click on the **'Settings'** icon that appears next to the chart.
- Select the connection from the **'Connections'** dropdown list (Ex: **Pie**)
- Drag and Drop the fields to their respective Series and Category, as shown below



x) Click on the 'Preview' icon  to view the results.