BizViz How-to-Guide

Dashboard Designer Excel Data Connection

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Table of Contents

1.	Doc	ument Purpose	3
2.	Prer	equisites	3
Ĩ	2.1.	Software	3
2	2.2.	Basic understanding of the BizViz Server	3
3.	Step	-by-Step Process	3
3	8.1.	Login to the BizViz Portal	3
3	3.2.	Steps to Create an Excel Data Connection	4



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

- i) In the URL bar, enter \rightarrow <u>http://apps.bdbizviz.com/app/index.html</u>
- ii) Enter your credentials to Login

	312112
Email	
Password	
Enterprise	
	LOGIN
	Forgot your password
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iii) Click on 'Login' to view the BizViz Portal Home Screen



iv) Click on the '**Menu**' E 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

Business Visualization Analytics Platform					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	
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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.

🔒 Home	Untitled Dashboard 🗶 🕂	H B	2
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- 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.

f Home Untitled Dashboard	× +				2	н	ę
CSV	+	Name	Connection-1				2
Excel	+	browse Sheet Name	Component-Default-Data.xlsx		Ŧ		
Connection-1	×	Load At Start	Yes No	`			
Webservice	+	Field Set	Condition	Script on Load			≣
Merged Data	+	Fields					
		Country					
		State					
		City					
		Population					
		Calculated fields		E	dit 🕂	_	



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.

- Image: Destrict of the set of the s
- 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

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x) Click on the '**Preview**' icon

to view the results.