# **BizViz How-to-Guide**

# <u>Platform</u> Data Management

Release: 2.0

**Date :** March 4, 2016

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### **1. Document Purpose**

The purpose of this document is to guide users on how to create data source connections in data management module. In order to create data connections, it is recommended that users follow the step-by-step process given below.

### 2. Prerequisites

#### 2.1. Software

- Browser that supports HTML5
- Operating System: Windows7

#### 2.2. Knowledge of BizViz Server

The user should have a basic understanding of the BizViz Server

# 3. Step-by-Step Process

#### 3.1. Login to the Portal to access Data Management

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

E	BIZVIZ
Email	
Password	
Enterprise	•
	LOGIN
	Forgot your password?

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



# **3.2.** Creating a Data Source

i) Click on menu '**Data Management**' Menu> Data Management

Business Visualiz Analytics P	latform BIZVIZ				Logged in as Avin Jain	🛛 Help	A Home	1	My account	🖱 Logout	
My Documents	C Public Documents	🕑 Favorites				ж	Q 🗐		Administ	tration	
My Documents									user Ma	nagement	
	Retail Industry	•	SupplyChain Industry	0	Education	¢			🛢 Data Ma	nagement	
									Business	Views	
									Business	Apps	
				-	1+3=4				ashboa 🔁	rd Designer	
	••								Report		
									Å Survey		
*	Oil & Gas Industry	0	Big Data Plugins	0	CA Clarity PPM	0		*	fit Social M	edia Browser Big	Data
									Social M	edia Browser	
	-								$\Theta_{\Theta}^{\odot}$ Sentime	nt Analyzer	
	. Å ℓ		(Ú))						Predictiv	ve Analysis	
	E E A		2-2						Google /	Account	
									👩 GeoSpat	ial Analysis	

ii) Clicking on the 'Data Management' button will redirect user to the following page

Business Visualization Analytics Platform	BizViz	)				Logged in as Avin Jain	🤁 Help	<b>↑</b> Home	L My account	٥Lo	igout
Data Connector			-	e i	Data Service Cube						
Search DataConnector				۹	Search DataService				Views 48	14 out o	f 484 Q
All Data Connector					InventoryTotalQuantity				1	×	۲
Demo_Partner	1	С	×	е	ForecastQueryMonth				1	×	۲
WT_DM_Dashboard	1	с	×	e	ForecastQuery				1	×	۲
SMB_AWS_Bigdata	1	С	×	e	Table_Values				1	×	۲
WT_Predictive	1	С	×	e	InventoryQuery				1	×	۲
bdi_demo_datamart	1	С	×	e	Year_Rev				1	×	۲
US_Automobile	1	С	×	e	Columns				1	×	۲
AWS Spark SQL	1	с	×	e	table name				1	×	۲

#### iii) Create a data source:

Click on the '+' button and select a data source from the list



Business Visualization Analytics Platform										
Data Connecto	r	+								
Search DataConneo	MySQL	٩								
All Data Connector	MSSQL									
Demo_Partner	Oracle									
WT_DM_Dashboard	Hive									
SMB_AWS_Bigdata	SAP Hana									
WT_Predictive	MS Sql Olap									

Enter the following fields:

- Data Source Name A user defined name to identify the data source
- User Name Should be the same as given in the connection server
- Password Should be same as given in the connection server
- Description Connection details/description
- Host Name/ IP The server database IP address
- Port The server port number
- Database name The name of the database where the data will be stored
- Database type The type of database that the data will be stored in (ex. MYSQL)

← → C 🗋 www.bdibizviz.com/app/index.ht	ml#			숡	∍ ≡
Business Visualization		9 Help	🕈 Home	L Demo	
+ AddDataSource 🔳 ListDataSource + AddQuery	yService 🛨 AddClarityWISDL 🔳 ListQueryService				
New DataSource					^
Datasource Name	Data Source Name				
User Name	User Name				
Password	Password				
Description	Description				
					- 1
Host Name/IP	Host Name/IP				- 1
Port	Port No.				
Database Name	DataBaseName				
Database Type	MySQL •				
		C	ancel	ive changes	

iv) Click on 'Save'

#### **3.3.** Viewing created Data Sources

i) Click on the 'List data source' button to view the existing data sources:

Business Visualizat Analytics Plat	tion form BizViz	)				Logged in as Avin Jain	🛛 Help	<b>↑</b> Home	L My account	OLo	gout
Data Connector	T			+	Data Service Cube						
Search DataConnec	tor			۹	Search DataService				Views 48	84 out of	f 484 Q
All Data Connector					InventoryTotalQuantity				1	×	۲
Demo_Partner	1	С	×	C	ForecastQueryMonth				1	×	۲
WT_DM_Dashboard	1	С	×	e	ForecastQuery				1	×	۲
SMB_AWS_Bigdata	1	С	×	e	Table_Values				1	×	۲
WT_Predictive	1	с	×	e	InventoryQuery				1	×	۲
bdi_demo_datamart	1	С	×	e	Year_Rev				1	×	۲
US_Automobile	1	с	×	e	Columns				1	×	۲

- ii) The following actions can be performed on data sources:
  - Users can edit a data source using the 'Edit data source' button.
  - The Search bar can be used to search for a particular data source.
  - Users can create, view, and execute queries on a selected data source using 'Query Builder.'

Basic description of 'Data Management' buttons:

S.No.	Button	Button Name	Description
1	1	Edit	Edit a data source connection
2	C	Reconnect	Option to reconnect in case of connection failure
3	×	Remove	Removes the connection
4	C	Share	Shares the connection details

#### 3.4. Creating a Query

# Data Management>Add Query Service

i) Select a Data source and Click on 📩 button

Business Visualization Analytics Platform	BizViz	)						Logged in as Avin Jain	😯 Help	🔒 Home	L My account	🖰 Log	out
Data Connector				÷	Data Service	Cube	+ 2						
Search DataConnecto	or -	Views 4	7 out o	<sub>F 47</sub> Q	Search DataService						,	/iews 1 out o	f1 Q
All DataConnector					HeatMap						1	×e	۲
SMBSparkSqlNew 1	1	С	×	e									
SMBSparkSqlNew	1	С	×	e	1								
SMB_AWS_SPARK_SQL20	1	С	×	e									
LendingClub	1	С	×	e									

ii) Clicking on the ticon will redirect user to the following page

Data Connector				F.	New Data Service	
Search DataConnecto	ог	views 4	7 out o	f 47 <b>Q</b>	Service Name	Service Name
All DataConnector						
SMBSparkSqlNew	1	С	×	e	Data connector Name	SWBSparksdivem .
SMBSparkSqlNew	1	С	×	е	Query	
SMB_AWS_SPARK_SQL20	1	с	×	e		
LendingClub	1	С	×	e		
TestCBA	1	С	×	е		
MySQL CBA Connector	1	С	×	e		*Use Ctrl+Space for assistance
Customer Benefits Analy	1	С	×	e	Description	Description
WT_CUSTOMER_FEEDBA	1	С	×	e		4
Test_native	1	С	×	e		
NativeX_BIStory_Connec	1	С	×	e		Cancel Test

iii) Description of the above fields are given below:

- Services Name User assigned name for the query service
- Data Connector Name Select a data source from the drop-down menu
- Query Write your query
- Description Any descriptive information related to the query

#### Note:

Rules to follow when creating queries:

- a. Table names should be in [] brackets
- b. Variables should be within @'s. (ex.@filter\_name@)
- iv) Click on the 'Test' to validate the written query
- v) Click on the 'Save'
- vi) Created query services will be listed under the data connector

Data Connector				F	Data Service Cube +			
Search DataConnecto	ог	Views 4	7 out o	F 47 Q	Search DataService	View:	1 out o	of 1
All DataConnector					HeatMap	×	C	•
SMBSparkSqlNew	1	С	×	e				
SMBSparkSqlNew	1	С	×	е				
SMB_AWS_SPARK_SQL20	1	С	×	e				
LendingClub	1	С	×	е				

Basic description of 'Query Service' buttons:

S.No.	Button	Button Name	Description
1	1	Edit	Used to edit the query service
2	×	Remove	Used to remove the created query
			service



3	C	Share	Used to share the query service with
			peers
4	0	View Link	Used to view the query data in web
			service form