

# BizViz How-to-Guide

## Platform

## Data Management

**Release :** 2.0

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## Table of Contents

- 1. Document Purpose ..... 3
- 2. Prerequisites ..... 3
  - 2.1. Software ..... 3
  - 2.2. Knowledge of BizViz Server ..... 3
- 3. Step-by-Step Process ..... 3
  - 3.1. Login to the Portal to access Data Management ..... 3
  - 3.2. Creating a Data Source ..... 4
  - 3.3. Viewing created Data Sources ..... 5
  - 3.4. Creating a Query ..... 6

## 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

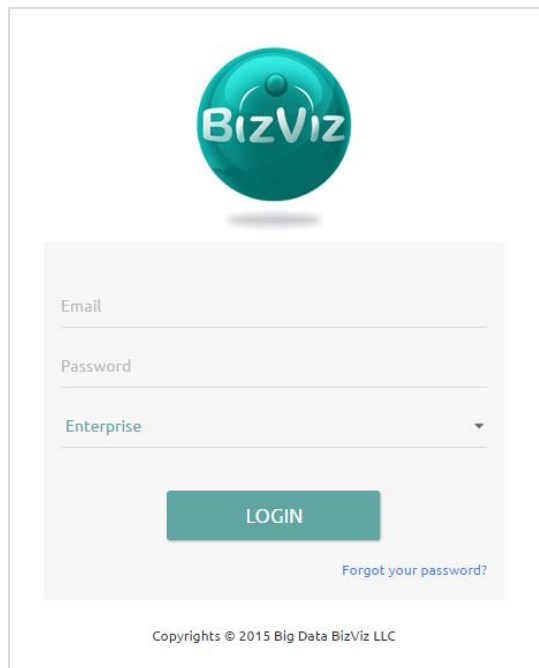
### 2.2. Knowledge of BizViz Server

The user should have a basic understanding of the BizViz Server

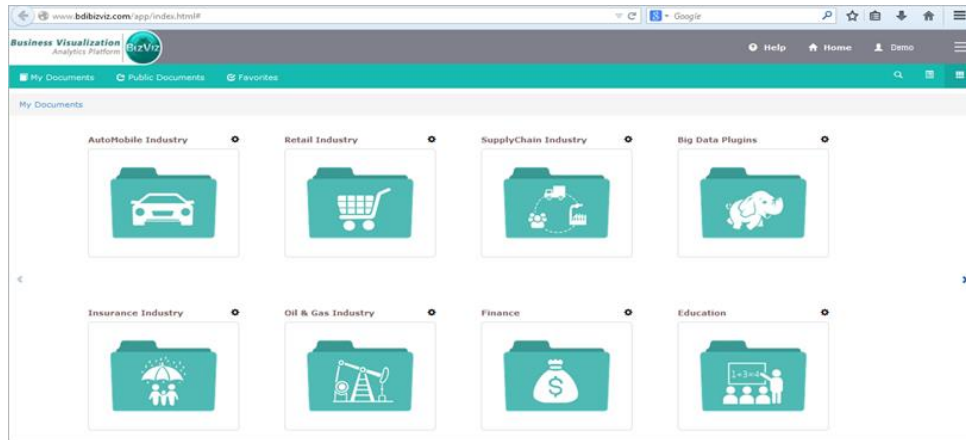
## 3. Step-by-Step Process

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

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

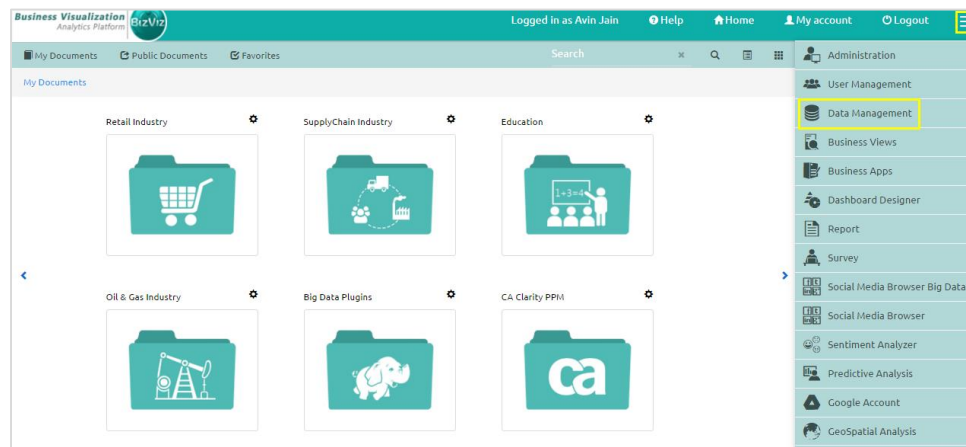


- Click on '**Login**' to view the BizViz Portal Home Screen



### 3.2. Creating a Data Source

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

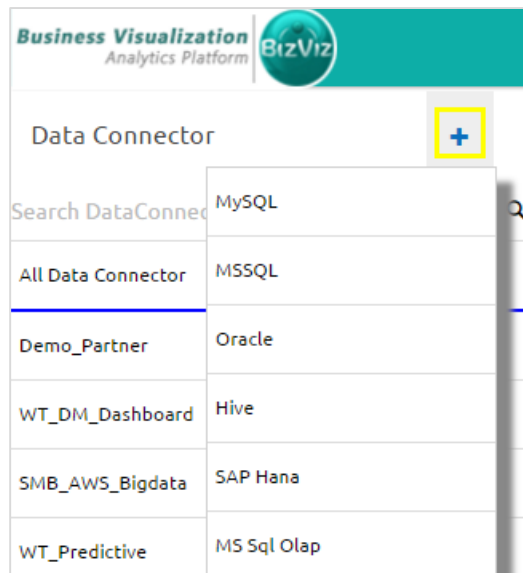


- ii) Clicking on the 'Data Management' button will redirect user to the following page

Data Connector		Data Service		Cube	
Search DataConnector		Search DataService		Views 484 out of 484	
All Data Connector		InventoryTotalQuantity			
Demo_Partner		ForecastQueryMonth			
WT_Div_Dashboard		ForecastQuery			
SMB_AWS_Bigdata		Table_Values			
WT_Predictive		InventoryQuery			
bdi_demo_datamart		Year_Rev			
US_Automobile		Columns			
AWS Spark SQL		table name			

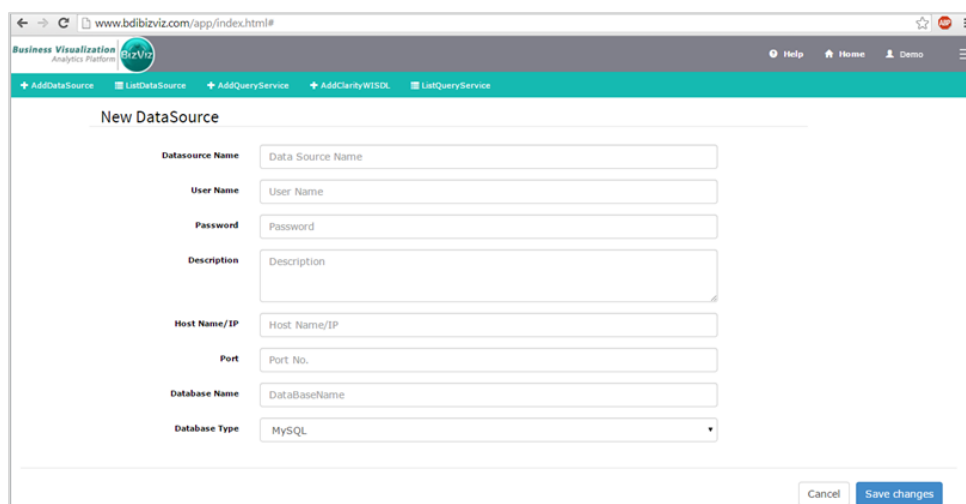
- iii) Create a data source:

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



Enter the following fields:

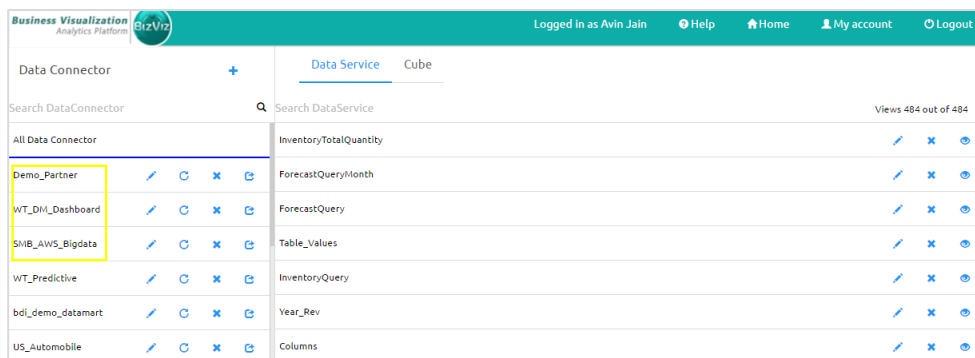
- **Data Source Name** – A user defined name to identify the data source
- **User Name** – Should be the same as given in the connection server
- **Password** - Should be same as given in the connection server
- **Description** – Connection details/description
- **Host Name/ IP** –The server database 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)



iv) Click on ‘Save’

### 3.3. Viewing created Data Sources





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



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.**’

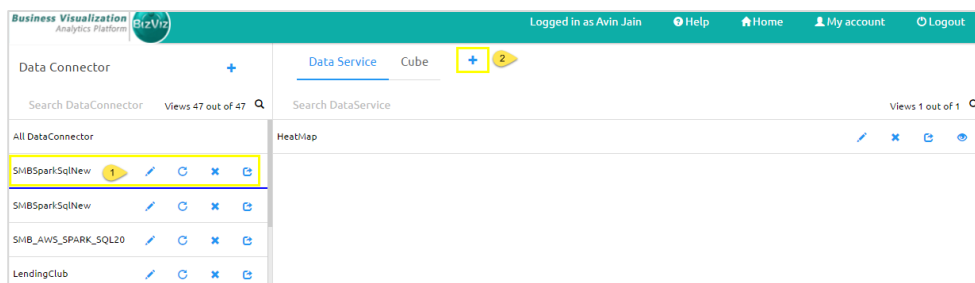
Basic description of ‘**Data Management**’ buttons:

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

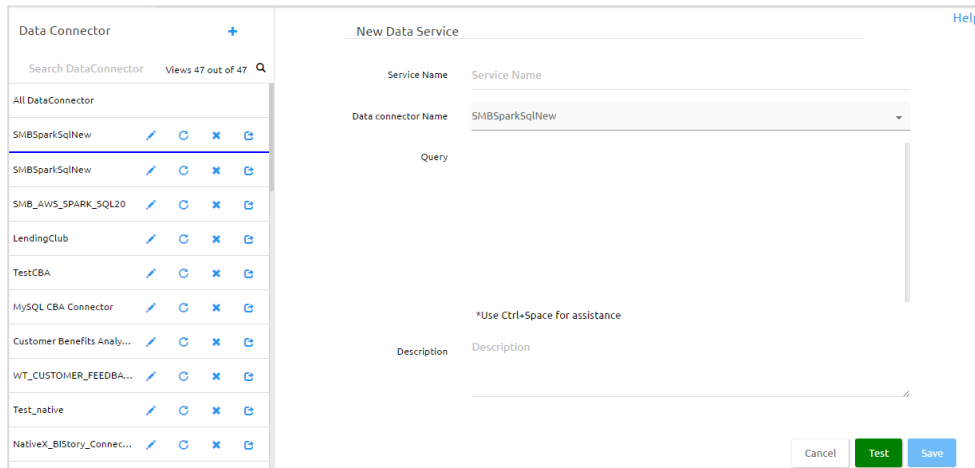
### 3.4. Creating a Query

#### Data Management>Add Query Service

i) Select a Data source and Click on  button



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



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:**

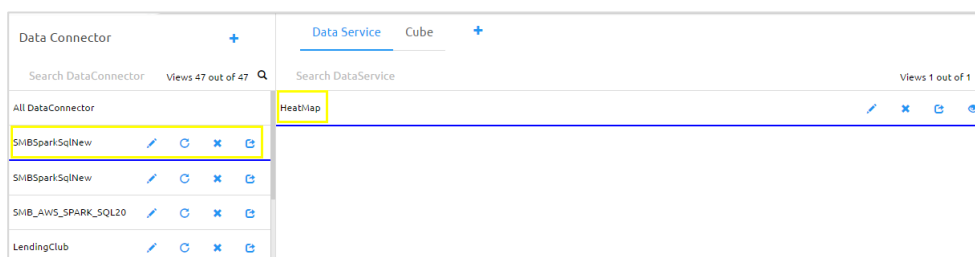
Rules to follow when creating queries:

- Table names should be in [ ] brackets
- 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



Basic description of 'Query Service' buttons:

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



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