

User Guide

Dashboard Designer- 4.3



Conte	ents	
1. Ab	out this Guide	4
1.1.	Document History	4
1.2.	Overview	4
1.3.	Target Audience	4
1.4.	Supported Web Browsers	4
2. Ge	tting Started with BDB Dashboard Designer	5
2.1.	Forgot Password Option	7
2.2.	Force Login	9
3. Da	shboard Designer Homepage	10
3.1.	New	10
3.2.	Manage	10
3.3.	Open from Local Disk	12
3.4.	Preferences	13
3.5.	Save As	13
3.6.	Help	14
3.7.	Exit	15
4. Wo	orkspace	4.6
4. 000	on space	16
4.1.	Creating a Workspace	
	-	16
4.1.	Creating a Workspace	16 17
4.1. 4.2. 4.3.	Creating a Workspace Renaming a Workspace	16 17 18
4.1. 4.2. 4.3.	Creating a Workspace Renaming a Workspace Deleting a Workspace	16 17 18 20
4.1. 4.2. 4.3. 5. Des	Creating a Workspace Renaming a Workspace Deleting a Workspace signer Canvas	
 4.1. 4.2. 4.3. 5. Des 5.1. 	Creating a Workspace Renaming a Workspace Deleting a Workspace signer Canvas Component Group	
 4.1. 4.2. 4.3. 5. Des 5.1. 5.2. 5.3. 	Creating a Workspace Renaming a Workspace Deleting a Workspace signer Canvas Component Group Canvas Properties	
 4.1. 4.2. 4.3. 5. Des 5.1. 5.2. 5.3. 	Creating a Workspace Renaming a Workspace Deleting a Workspace signer Canvas Component Group Canvas Properties Context Menu Properties	
 4.1. 4.2. 4.3. 5. Des 5.1. 5.2. 5.3. 6. Con 	Creating a Workspace Renaming a Workspace Deleting a Workspace signer Canvas Component Group Canvas Properties Context Menu Properties nnecting to a Data Source Connecting to a CSV File	
 4.1. 4.2. 4.3. 5. Des 5.1. 5.2. 5.3. 6. Con 6.1. 	Creating a Workspace Renaming a Workspace Deleting a Workspace signer Canvas Component Group Canvas Properties Context Menu Properties nnecting to a Data Source Connecting to a CSV File	
 4.1. 4.2. 4.3. 5. Des 5.1. 5.2. 5.3. 6. Con 6.1. 6.1 	Creating a Workspace Renaming a Workspace Deleting a Workspace Signer Canvas Component Group Canvas Properties Context Menu Properties nnecting to a Data Source Connecting to a CSV File 1.1. Condition	
 4.1. 4.2. 4.3. 5. Des 5.1. 5.2. 5.3. 6. Con 6.1. 6.1 6.1 6.1 	Creating a Workspace Renaming a Workspace Deleting a Workspace signer Canvas Component Group Canvas Properties Context Menu Properties nnecting to a Data Source Connecting to a CSV File	
4.1. 4.2. 4.3. 5. Des 5.1. 5.2. 5.3. 6. Con 6.1. 6.1 6.1 6.1	Creating a Workspace Renaming a Workspace Deleting a Workspace signer Canvas Component Group Canvas Properties Context Menu Properties nnecting to a Data Source Connecting to a CSV File L1. Condition L2. Calculated Field L3. Script on Load for a Data Connection	
4.1. 4.2. 4.3. 5. Des 5.1. 5.2. 5.3. 6. Con 6.1. 6.1 6.1 6.1 6.1 6.2.	Creating a Workspace Renaming a Workspace Deleting a Workspace signer Canvas Component Group Canvas Properties Context Menu Properties nnecting to a Data Source Connecting to a CSV File L1. Condition L2. Calculated Field L3. Script on Load for a Data Connection Connecting to an Excel File	

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6	.6. C	Connecting to a Websocket	39
6	.7. C	Connecting to a Merged Data	40
	6.7.1.	Deleting a Data Connection	41
	6.7.2.	Connecting Data Set Connection to a Dashboard Component	41
7.	Comp	onents	44
8.	Dashb	ooard Objects	45
8	.1. N	Aanage Dashboard Components	45
	8.1.1.	Dashboard Object Properties	45
9.	Data [Drill-Down	46
9	.1. P	Passing Default Values	46
9	.2. P	Performing Dynamic Filtering	49
10.	Scri	pting Window	52
11.	Ma	naging Options	57
1	1.1.	Opening a Dashboard	58
1	1.2.	Publishing a Dashboard	59
1	1.3.	Deleting a Dashboard	62
	11.3.1	Restoring the Deleted Dashboard	62
1	1.4.	Actions	63
	11.4.1	Renaming a Dashboard in Designer	63
	11.4.2	2. Moving a Dashboard	65
12.	Sav	ing a Dashboard	66
1	2.1.	Save	66
1	2.2.	Save to Another Workspace	67
1	2.3.	Save to Local Disk	68
13.	Sigr	ning Out	68



1. About this Guide

1.1. Document History

Product Version	Date (Release date)	Description
Dashboard Designer 1.0	June 20 th , 2015	First Release of the document
Dashboard Designer 2.0	Feb 18 th , 2016	Updated document
Dashboard Designer 2.5	Nov 9 th , 2016	Updated document
Dashboard Designer 2.5.3	March 16 th , 2017	Updated document
Dashboard Designer 3.0	August 31 st , 2017	Updated document
Dashboard Designer 3.2	February 2 nd , 2018	Updated document
Dashboard Designer 3.5	April 15 th , 2018	Updated document
Dashboard Designer 3.5.1	July 5 th , 2018	Updated document
Dashboard Designer 3.6	August 20 th , 2018	Updated document
Dashboard Designer 3.7	October 10 th , 2018	Updated document
Dashboard Designer 3.8	December 1 st , 2018	Updated document
Dashboard Designer 4.0	December 31 st , 2018	Updated document
Dashboard Designer 4.2	March 25 th , 2019	Updated document
Dashboard Designer 4.3	April 24 th , 2019	Updated document

1.2. Overview

This guide covers:

- Explanation and usage of all the menu options
- Connecting to data and creation of dashboards
- Explanation and usage of the dashboard components
- Publishing and sharing of dashboards

1.3. Target Audience

This guide is aimed at users who wish to create and export interactive dashboards by connecting to a wide range of data sources.

1.4. Supported Web Browsers

The BDB Platform is a web browser-based application. The users can run the BDB Platform and its various plugins on the below given versions of the browsers:

Mozilla Firefox/ Firefox ESR	Latest Version
Microsoft Internet Explorer	11
Microsoft Edge	Latest Version
Apple Safari	10
Google Chrome	Latest Version (recommended web browser)



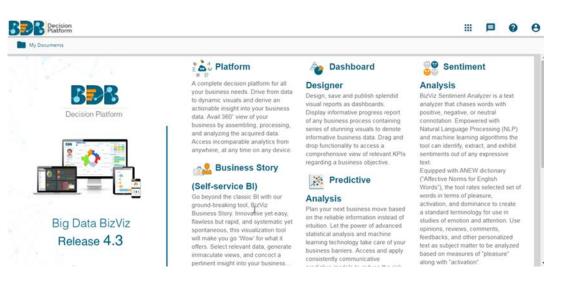
2. Getting Started with BDB Dashboard Designer

This section covers the initial steps to access the BDB Dashboard Designer plugin using the BDB Platform.

- i) Open the BDB Enterprise Platform Link: https://app.bdb.ai
- ii) Enter your credentials to log in to the platform.
- iii) Click the 'Continue' option.



iv) BDB Platform homepage opens.



Note: The above screen opens only for those newly created users who have not yet created any document using the BDB Platform.

- v) Click on the 'App' menu button.
- vi) Select the '**Designer**' plugin from the app menu.





vii) A new window opens displaying landing page for the Dashboard Designer.

Decision E	Designer +		
+ New -	Welcome, admin		Take a tour
🚊 Manage	Simple Drag and Drop	Highly interactive and	Mobile, Tablet and
Open from Local Disk	UI Drag any chart or grid from the Component Paral and drids to your	Dnill Down Each cashboard can have multiple widgets and foret wind can be	Desktop Views Customizable layouts to view the interactive deathooaces from proves.
🖈 Preferences	designer carves, it is increatibly intuctive and smooth functionality for	attered in a click to get cara analytics at the speed of shought, SDK methods	Customazer ayouts so when the networks, the source and operations. Making the data ringss accessible all the sime for
🗎 Save as	60+ Components and	Advanced Visualizations	Import Custom
😯 Help	Check out our exclusive range of visualization check out our exclusive range of visualization	Explore complex business data in the most simplified way using our advanced visualization components.	Component Incorporate any third- party vinualizations to pour cathorand, including
🖒 Exit		Avail a series of interactive charting opcions like Time-	D3 Charte. DataTables etc.
	Save Your Filter	Export Dashboard	Live Data Connectors
	Addre Your Filter Selections Addreadours and serve serving at fibers and serve	Use modern browser technology to accomplish export charts to PPT/ PDF/	Extract and consolidate live data from a wide range of data sources.
	them for the future deshboard viewers to provide them with a unique inselect into the	PNG Excel were under an external server. Endre	Accommodate views generated from various data sources in a single
	Dashboard Designer 4.2.0		Released on: March 5, 13:54

- viii) Click the 'Take a tour' option.
- ix) A new window appears initiating the landing page tour.
- x) Click the '**Next**' option to move ahead in the guided tour.

Note: Clicking the 'End tour' option ends the guided tour for the user.



Decision Decision Des	igner +	
+ New -	Welcome, admin	1 Take a tour
🚔 Manage	Simple Drag and Drop Highly Interactive and Drill Down	Mobile, Tablet and
Open from Local Disk	UI Drig any chansor grid from the Component	Desktop Views Customizable layouts to view the interactive databhards from phones
★ Preferences	2 Welcome, admin	Lalless and desktops. Making the data insights
H Save as	This tour of Dashboard designer will guide you through some of the features we'd like to point out.	Import Custom Component
😯 Help	the attraction of the second s	incorporate any third- party visualizations to your dashbard, including
🖒 Exit	end tour wall series Arring	D3 Charts, DataTables etc.
	Save Your Filter Selections Advantage a filter and save then for the four end of the four end	Uve Data Connectors Errace and controlicate traces of acts action a wide races of acts actions a wide races of acts actions traces of acts actions acts actions and traces of acts actions traces of actions t
	Dashboard Designer 3.8.0	Released on: December 21, 20:31

2.1. Forgot Password Option

Users are provided with a choice to change the password on the Login page of the platform.

- i) Navigate to the Login page.
- ii) Click 'Forgot your password?' option.



•
Forgot your password ?

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- iii) A new window opens.
- iv) Provide the email id that is registered with BDB to send the reset password link.
- v) Click the 'Continue' option.

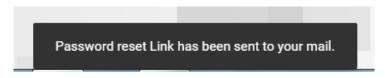




To reset your password, enter the email address you use to sign in to BizViz. This can be your email address associated with your account. Email * admin@bdb.ai Sign in Continue

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vi) Users may be redirected to select a space in case of multiple spaces under one server link(They need to select a space and click the 'Continue' option once again). If users do not have multiple spaces then, a message appears to notify the user that about the password reset link (The users receive the reset link via their registered email.)



- vii) Click the link from your registered email.
- viii) Users get redirected to the 'Reset Password' page to set a new password.
- ix) Set a new password.
- x) Confirm the newly set password.
- xi) Click the '**Continue**' option.



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xii) The password for the selected BDB account gets reset.



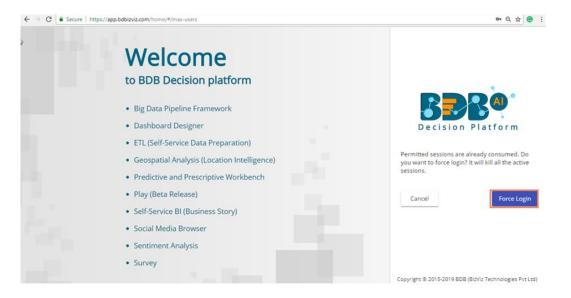
2.2. Force Login

The 'Force Login' functionality has been introduced to control the number of active sessions up to three. The users can access only 3 sessions at a time when they try to access 4th session a warning message displays to inform that the user has consumed the permitted sessions and a click on the 'Force Login' would kill all those active sessions.

- i) Navigate to the BDB Platform Login page.
- ii) Enter the valid credentials to log in.
- iii) Click the 'Continue' option.

EDB Sarvey		
	Governed Das	
		Decision Platform
Thed Party APts	BDB AI / ML Layer	
(H) 🧶	Desthoo	end 2 Email *
Data Lake	> Dashboard Designer	admin.user@bdb.ai
*		Password *
		Auth Type
	Kined Self Service BI Dashboard Self Service	
	Self Service Layer	Y Forgot your password
Data Layer		
	← Servertess Data Pipeline →	Continue

- iv) The user gets the following message if the user already consumes the permitted active sessions (3 sessions at a time).
- v) Click the 'Force Login' option.



- vi) A warning message appears that the currently active sessions get killed for the user and the user has redirected to the log in a page of the BDB Platform.
- Note: The user can successfully login to the BDB Platform after selecting the '**Force Login'** option to log in the platform.



3. Dashboard Designer Homepage

The Designer homepage displays a list of tasks in the left panel that users can perform on a dashboard. The users can add a new Dashboard/Workspace, Manage the existing Dashboard(s)/Workspace(s), set preferences for a dashboard, save the dashboard with a different name or open it from the local disk if saved there and exit the Designer plugin all through this panel.



3.1. New

This option directs users to create a new workspace or dashboard.

- i) Navigate to the Designer homepage.
- ii) Click the '**New**' drop-down menu.
- iii) Users will be provided with two options:



- a. **Workspace**: Clicking this option redirect the users to create a new workspace/place holder for the dashboard.
- b. **Dashboard**: By clicking this option the users get redirected on the Designer Canvass to create a new dashboard.

3.2. Manage

- i) Navigate to the Designer home page.
- ii) Click the 'Manage' option.



🛨 New -		
🖻 Manage		
Open from Local Disk		
★ Preferences		
H Save as		
? Help		
🖒 Exit		

- iii) Users will be directed to manage the following tasks for a Workspace or Dashboard:
 - a. Tasks for a Workspace
 - i. Search a Workspace
 - ii. Add a new Workspace
 - iii. Reload all the Workspaces
 - iv. Rename the workspace
 - v. Delete the Workspace (Trash Workspace)

Becision Designer +					
+ New -	Workspaces (45)	<mark>3⊕ 2</mark> C <mark>1</mark> Q			
🚔 Manage	All Dashboards				
A Open from Local Disk	Yujaa Migrated	♦४३			
★ Preferences					
💾 Save as	hiring_data	/ 1			
3 Help	crictix	/ 1			
🕐 Exit	BI test	1			
	Multiplier Solution	/ 1			

b. Tasks for a Dashboard

To access the options, the users need to select a dashboard from an existing workspace as displayed in the following image:

- i. Search a Dashboard
- ii. Open the Dashboard in Designer to Edit or modify
- iii. Publish the Dashboard to the portal
- iv. Delete the Dashboard



v. Actions- Apply the various actions on a dashboard

+ New -	Workspaces (45) 🕒	C	Q	Dashboards (1)	<mark>1</mark> Q
🚔 Manage	Trainning Workspace		Î	Product Sales foreca	<mark>∕</mark>
🧕 Open from Local Disk	Cricket Analysis	1	Î		
★ Preferences	Education Solution		-		
💾 Save as	Country Million Duraite	-	_		
🕄 Help	ConstruWise_Bonita		Î		
😃 Exit	Eaton	1	Î		

- c. Users get the following options while clicking the Action icon provided for a Dashboard.
 - i. Preview the dashboard
 - ii. Export to Local Disk
 - iii. Rename the Dashboard
 - iv. Move the Dashboard from one Workspace to another Workspace

1 Preview	Ţ
2 Export To Local Disk	<u>+</u>
3 Rename	1
4 Move To	

Note: The 'Manage' options are explained at detailed under Section 5 (for Workspace) and 12 (for Dashboard) of this document.

3.3. Open from Local Disk

- i) Navigate to the Designer homepage.
- ii) Click 'Open from Local Disk' from the given options.
- iii) Users will be directed to open the downloaded files (.bvzx) from the local disk.

+ New -	C Open
🚊 Manage	- ♀↓ > Downloads 4y Search Downloads 9 Organize ▼ New folder
Open from Local Disk	× Favorites
★ Preferences	tropbox ■ iCloud Photos iCloud Drive iCloud Drive
💾 Save as	Desktop Candidate GoneDrive Deskboard.dvzx
Help	🕞 Libraries
🖒 Exit	Documents Music Pictures
	Videos
	File name: Dark_theme_BDB Candidate Dashboard.bvzz



3.4. Preferences

- i) Navigate to the Designer homepage.
- ii) Click the 'Preferences' option from the left panel.
- iii) Users will be directed to set preferences for dashboard canvass.
- iv) Set the desired preferences and click 'Save' option.

Decision Decision	ner (+)		
🕂 New 🗸		Preferences	
🚔 Manage			
Open from Local Disk		Show grid lines	
★ Preferences		Snap To Grid Size	None 🔻
🗎 Save as		Notify on success	
😗 Help		Block Notification	
🖒 Exit		Show settings button	
		Selection color	
		Selection thickness	1
		Show border	✓
		Border color	
		Background color	
		Fixed dimension	
		Hide Shadow	✓
		Sync Component Property	
			Save

- v) The selected preferences will be applied on the dashboard canvass.
- vi) The available preferences for a dashboard are as described below:

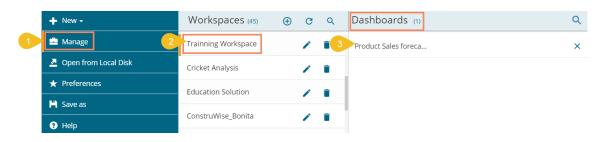
Property name	Description
Show Grid Lines	Enable this option to display grid lines in the designer area
Snap to Grid Size	Select an option to display the grid size (None/5/10/15)
Notify on Success	Enable this option to get a notification on success
Block Notification	Enable this option to block the notification message
Show Settings Button	Enable this option to display toolbar when any component is selected
Selection Color	Select a color to display when any component when dragged to the canvass
Selection Thickness	Set (increase/decrease) the thickness of the component border
Show Border	Enable this option to display a border on the dashboard
Border Color	Select a border color to display in the Dashboard
Background color	Select a color to display in the dashboard background
Fixed dimension	Enable this option to set fixed height & width of the dashboard
Hide Shadow	Enable this option to hide the shadow of the components
Sync Component Property	Enable this option to synchronize the component property

3.5. Save As

i) Navigate to the Designer homepage.



ii) Open a new dashboard using the 'Manage' option or select an existing dashboard from the list of available dashboards.



- iii) Click the 'Save As' option from the left panel.
- iv) A pop-up window will appear to confirm the action.
 - a. Original dashboard name will appear with "Copy_Of" prefix (the users can edit the name as per their wish).
 - b. Select a workspace from the drop-down menu.
 - c. Click the 'Save' option.

	+ New -	Work 5 Save As	×
	🚔 Manage	BDB Templat	
	Open from Local Disk	6 Name Copy_of_Product Sales forecasting	~
	★ Preferences	7 Workspace BDB Templates	- C
4	H Save as	Cricket Analys Save	Cancel
	😯 Help		
	🖒 Exit	Education Solution 🧪	
		ConstruWise_Bonita 🧪 🧻	

v) A copy of the selected dashboard will be saved in the chosen workspace.

Workspaces (45)	\oplus	C	Q	Dashboards (3)				Q
ODC Final version		/	i 9	Copy_Of_Product Sa	F	•	Î	:
BDB Templates		/	ĩ	Finance Dashboard	ſ	•	Î	:
Logistics		/	ĩ	Expense Manageme	ſ	0	Î	:
Trainning Workspace		/	Î					

3.6. Help

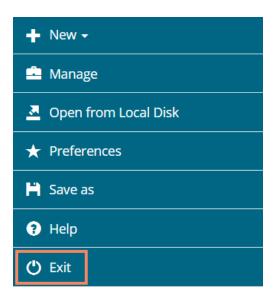
- i) Navigate to the Designer homepage.
- ii) Click the 'Help' option.
- iii) The Help Content to understand the BDB Dashboard Designer plugin appears.



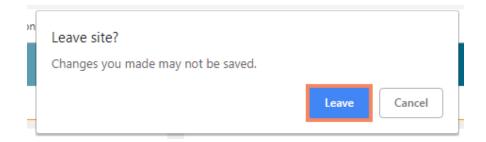
+ New -	Introduction	BizViz Dashboard Designer		
🚔 Manage 🦯	How To ? 🔻	It is a web browser-based application which is used to build dashboar features, and data integration capabilities, that empower users to cre	rds and design analytics. It comes preload	ed with a wide range of charts,
A Open from Local Disk	Component Gallery 🔻	reacures, and data integration capabilities, that empower users to cre	ate mornative and appealing visual repr	esentations of their data.
★ Preferences	Configuration 🔻			
🗎 Save as	Connection 🔻			
😯 Help	Script & Samples			
🕐 Exit	Keyboard shortcuts			
	References			
	Online Support			
		• •		
		0:00 / 2:02) [] [
		Connect to all of your Data	ORACLE	((Chadooo

3.7. Exit

- i) Navigate to the Designer homepage.
- ii) Click the 'Exit' option.



iii) If work is not saved, users will get an option while closing to leave or cancel the action of exit.
 Select 'Cancel' if required to save the work, else choose 'Leave' to close the designer.



Or



Users will be directed to the BizViz Platform homepage.

Note: Users can also click the **'Close'** button (the 'X' on the right edge) of the Dashboard Designer tab to leave/close designer tab.





Users will be directed to the BizViz Platform home page after closing the designer application.

4. Workspace

4.1. Creating a Workspace

A Workspace is the place holder where users can save multiple dashboards.

- i) Navigate to the Dashboard Designer homepage.
- ii) Click 'New' or Click the 'Add' option 🖬
- iii) Click 'Workspace' from the context menu.

🕂 New 🗸	
Workspace	
Dashboard	

- iv) A pop-up window will appear.
 - a. Workspace Name: Enter a title for the Workspace in the given field.
 - b. Click the 'Save' option.

, a New works	pace		×
1 Name	Sample Workspace		
most suitable for you		2 Save	Cancel



v) The newly created workspace gets saved under the list of the existing **Workspaces**.

🕂 New 🗸	Workspaces (5)	Q					
🚔 Manage	All Dashboards	All Dashboards					
Open from Local Disk	Sample Workspace	<i>•</i>					
★ Preferences	MigrationTestdashboard		i				
H Save as	Untitled Workspace		-				
Help			•				
🖒 Exit	Sujith						
	workflowCheck		Î				
	Trash		×				

4.2. Renaming a Workspace

- i) Select a workspace from the 'Workspaces' list.
- ii) Click the 'Rename' icon.

	Workspaces (5)	Ð	G	Q
	All Dashboards			
0	Sample Workspace	2		Î
	MigrationTestdashboard		/	Î
	Untitled Workspace		/	Î
	Sujith		/	Î
	workflowCheck			Î
	Trash			×

- iii) The Rename window appears to assure the action.
 - a. Provide a new name for the dashboard.
 - b. Click 'Rename' to save the new name.



ac Rename	×
arc	
3 Workspace1	
est	
ork	4 Rename Cancel

- iv) A message appears to assure the success of the renaming action.
- v) The selected workspace will be saved with the new name.

Decision Decision	igner 🕂 📀 Dasht	ooard has l	been ren	amed 🗙
+ New -	Workspaces (5)	⊕ C	Q	Dashboards Q
🚔 Manage	All Dashboards			
Open from Local Disk	Workspace1	1		
★ Preferences	MigrationTestdashboard			
💾 Save as	Migration estuastibuard		Î	
3 Help	Untitled Workspace		Î	
🖒 Exit	Sujith	1		
	workflowCheck	1	Î	
	Trash		×	

4.3. Deleting a Workspace

- i) Select a workspace from the 'Workspaces' list.
- ii) Click the '**Remove**' icon.

	Workspaces (5)	Ð	C	Q
	All Dashboards			
1	Workspace1		1 2	ī
	MigrationTestdashboard		/	Î
	Untitled Workspace		/	Î
	Sujith			Î
	workflowCheck			Î
	Trash			×



- iii) A window will pop-up to confirm the deletion.
- iv) Click the '**Remove**' option.

ac	Remove X
arc 1	If you are removing the workspace "Workspace1", dashboards under the workspace will be moved to Trash. Are you sure to move it to trash?
ork	Remove Cancel

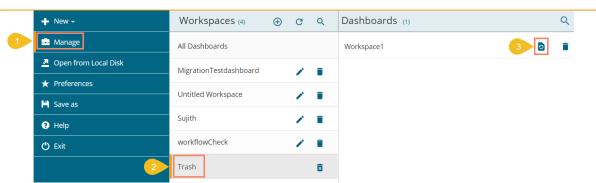
v) The selected workspace will be removed from the list and added to the Trash Workspace.

Workspaces (4)	\oplus	C	Q
All Dashboards			
MigrationTestdashboard		1	Î
Untitled Workspace		1	Î
Sujith		1	Î
workflowCheck		1	Î
Trash			X

Note:

- a. Removing a workspace will also move all the dashboards saved under it into the trash.
- b. Click the '**Reload Workspaces**' icon \subseteq provided next to the Workspaces list to load all the workspaces again.
- c. Click the '**Restore**' con from the '**Trash**' workspace to restore deleted workspaces.
 - i. Click the 'Manage' option.
 - ii. Navigate to the 'Trash' workspace created under the list of all the workspaces.
 - iii. Select a deleted workspace that you want to restore and click the '**Restore**' **D** icon.





d. Click the '**Remove Permanently**' icon from the Trash workspace to delete a workspace or dashboard permanently.

5. Designer Canvas

Dashboard Designer space can be understood as a folder that contains Data Source connections, Components, Dashboard Objects, Component Attributes.

Click the 'New' drop-down icon on the homepage and select the 'Dashboard' option to access the Designer space/Canvas.

A wide range of filters, charts, and Data grids are available on the Designer space to create a dashboard.

Refer to the following image to understand the various components provided on the Designer Canvas:

- **1. Tab:** Place where dashboard design takes place. Drag and drop charts and components here to create dashboards.
- 2. Mobile .: Displays Dashboard screen like Mobile device
- **3. Tablet .**: Displays Dashboard screen like Tablet
- 4. Large Screen 🛄: Displays Dashboard screen like Desktop
- 5. Save to Local Disk 📥: Saves the created dashboards to your local disk.
- 6. Save to Another Workspace (Save As) : Saves a copy of the original dashboard to another workspace.
- **7.** Save (Dashboard) **1**: Saves the created dashboards in a workspace.
- **8. Preview —**: Displays the preview mode of the dashboard.
- **9.** Full Screen **2**: Maximizes the dashboard for a better view.
- **10.** Data Connectors E: Connects to a wide range of data sources.
- **11.** Component Library 🕒: Includes a compelling range of charts, filters, and data grids.
- **12. Manage Dashboard Components** : Option used to lock, hide, and order layout of the components on the dashboard.
- **13.** Component Variables and Script ²³: Option used to define component scripts.



Ð

2



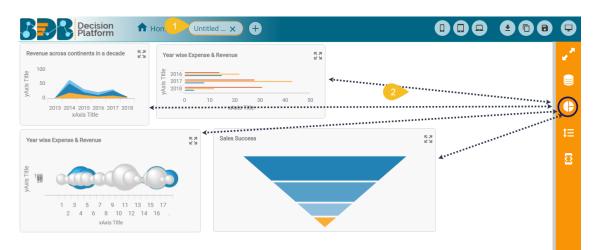
Note:

- a. Users will be redirected to the Designer homepage by clicking the 'Home' n option.
- b. Using the 'Save As' option, users can also save a dashboard in the same workspace with a different name.

5.1. Component Group

Users can create component groups and manage the created groups by using the 'Manage Group' option from the Designer Canvas.

- i) Navigate to the Designer Canvas.
- ii) Select and drag multiple components to the canvas using the 'Component Library' icon.



iii) Use the right click on the canvas to avail the 'Dashboard Objects' option.

or Click the **'Manage Dashboard Components' I**icon from the canvas menu bar.



Revenue across continents in a decade	Year wise Expense & Revenue			2
000 100 100 100 100 100 100 100 100 100	2016 2017 2017		Preview	
0 2013 2014 2015 2016 2017 2018 xAxis Title	0 10 20 30 40 50 xAxis Title		Data Sources Components	¢
Year wise Expense & Revenue	к ж К м	К.Я. 2 М	Dashboard Objects Component Attributes	1
1 3 5 7 9 11 13 15 2 4 6 8 10 12 14 xxxis Title	17 16		Select All (Ctrl+a) Properties	2
CAXIS THE				

- iv) A new panel opens with the dragged components names.
- v) Select 'Manage Group' icon from the panel.

)		anage (iroup	₽
Search			5	0) ×	2
Objects (4)	\$	R	Ê	Î	ē	
area1	C			Î	\Box	
bar2	C]		Î	\Box	¢
bubble3	C			Î	\Box	t=
funnel4				Î	\Box	+=
						2

- vi) A new window will pop-up to add the group.
- vii) Click the 'Add Group' option to add a new group

×	\equiv	-
Î	ī	G
		`
	ĺ	

- viii) Select the dragged component that you wish to add to the created group
- ix) Click the 'Add Selected Component' + icon to add the selected components to the newly created group

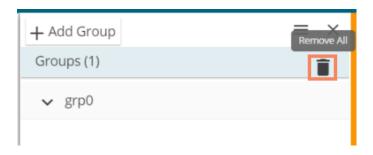


Revenue across continents in a decade	+ Add Group = ×			
	∧ grp0 🔌 🕂 🖍 🖡 📔			
2013 2014 2015 2016 2017 2018 xAxis Title	area1 X Dar2 A Z			
Year wise Expense & Revenue Sales Success				
191 191 191 191 191 191 191 191 191 191				

x) To Delete: Click the '**Delete**' option provided next to the group name to delete the group. Click the '**Close**' option provided next to the component to remove the component from the group.

+ Add Group			=	≡ ×
Groups (1)				Î
∧ grp0	Ø	+		Î
area1				\times
bar2		Ļ	4	×

Note: Click the 'Remove All' icon to delete all the created/added groups.



5.2. Canvas Properties

The Designer canvass is provided with specific properties.

- i) Navigate to the Designer canvas.
- ii) Use the Right-click anywhere on the canvas.
- iii) Select '**Properties**' option from the context menu.



Becision Hom (1 x +		P
Revenue across continents in a decade K A Year wise Expense & Revenue	Preview	2
	Data Sources	
0 10 20 30 40 50 2013 2014 2015 2016 2017 2018 xAxis Title	Components Dashboard Objects	¢
Year wise Expense & Revenue د کم Sales Success کم Sales Success	Component Attributes Select All (Ctrl+a)	t≡
Mil Title	Properties	2
1 3 5 7 9 11 13 15 17		
2 4 6 8 10 12 14 16 . xAxis Title		

iv) The following Canvas properties will be displayed:

4	Dashboard		×	
	Border			
	Global Font And Themes			
	Gradient			
	Size			
	Screen Size :	Custom	•	
	Width :	1052		
	Height :	472		
	Enable Scaling :			
	Scaling View :	Fit to page	•	

a. Border

Border	
Thickness :	1
Border Color :	

Parameter Name	Description
Thickness	Set border thickness.
Border Color	Select a border color from the menu.



b. Global Font and Themes

Global Font And Themes				
Use Global Shadow :				
Shadow Color :				
Shadow Transparency :	0.1			
Use Global Font :				
Font Family :	Roboto 🔻			
Designer themes :	Default 🔹			

Parameter Name	Description
Use Global Shadow	Enable this option to display global shadow
Shadow Color	Select a color from using the menu
Shadow Transparency	Set the transparency for the shadow
Use Global Font	Enable this option to use the global font.
Font Family	Select a font type from the drop-down
	menu.
Designer Themes	Select a theme from the drop-down menu.

c. Gradient

Gradient	
Background Colors :	۵
Opacity :	1
Background Rotation :	0

Parameter Name	Description
Background Colors	Users will be directed to select a background color.
Opacity	Set background color opacity.
Background	Set the value to rotate background color accordingly
Rotation	

Note: By clicking the '**Background Colors**' icon, a new window opens with a menu to select color for the Background gradient colors. The users can select a color using the menu and click the 'Save' option to apply the selected background gradient color.



8	Background gradient colors			
10	Color			
	More Colors	Cancel		

d. Size

Size		
Screen Size :	Custom	•
Width :	1052	
Height :	472	
Enable Scaling :		
Scaling View :	Fit to page	•

Parameter Name	Description
Screen Size	Select an option from the drop-down menu.
Width	Increase/decrease width of the dashboard.
Height	Increase/decrease height of dashboard.
Enable Scaling	Enable this option to display scaling.
Scaling View	Select an option from the drop-down menu (Fit to page/Fit to width/Fit to height/Proportional)

Note: Dashboards screen size can be scaled based on display devices (E.g., Mobile, iPad, and PC).

- Right click on the Dashboard Designer canvas.
- Select Properties.
- Select the desired 'Screen Size' using the Size properties option.

	Dashboard		×
	Border		
	Global Font And Theme	:5	
	Gradient		
	Size		
1	Screen Size :	Custom	•
	Width : 2	Custom	
	Height :	Ipad Portrait(768 X 10 Ipad Landscape(1024	-
	Enable Scaling :	Iphone Portrait(414 X Iphone Landscape(73	
	Scaling View :	800 X 600	
		1280 X 1024 1600 X 900	-

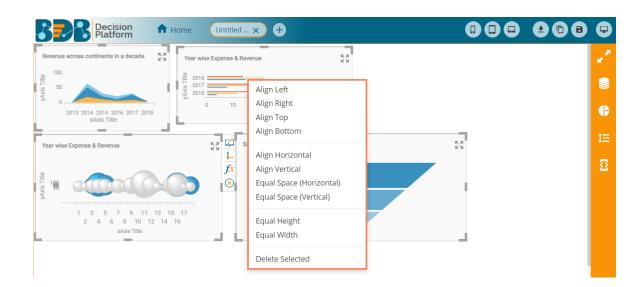


5.3. Context Menu Properties

This section describes properties applied to multiple components when dragged into the designer canvass and selected.

Steps to Access the Context Menu Properties:

- i) Drag multiple components into the designer canvas (At least three components to avail all the properties).
- ii) Select multiple components from the canvas. (At least three)
- iii) Use right-click to open the context menu.
- iv) The following properties will be listed in the context menu:
 - a. Align Left: All the selected components will be aligned left.
 - b. Align Right: All the selected components will be aligned right.
 - c. Align Top: All the selected components will be top aligned.
 - d. Align Bottom: All the selected components will be bottom aligned.
 - e. Align Horizontal: All the selected components will be aligned horizontally.
 - f. Align Vertical: All the selected components will be aligned vertically.
 - g. Equal Space (Horizontal): All the selected components will have equal space horizontally.
 - h. Equal Space (Vertical): All the selected components will have equal space vertically.
 - i. Equal Height: All the selected components will have equal height.
 - j. Equal Width: All the selected components will have equal width.
 - k. Delete Selected: To delete the selected components.



6. Connecting to a Data Source

This section explains a step-by-step process to create a connection by using the available data connectors.

- i) Click the '**Data Connectors**' icon using the Designer canvas.
- ii) A new screen opens displaying the following data connection options:
 - a. CSV



- b. Excel
- c. Web Service
- d. Predictive Service
- e. Data Store
- f. Websocket
- g. Merged Data

Decision Platform	A	Home Untitled x +	208	Ģ
2 CSV	+		×	2
Excel	+	Please create a connection !	1	
Data Service	+			¢
Predictive Service	+			t≡
Data Store	+			Ð
Web Socket	+			
Merged Data	+			

- iii) Select a data connection type and click the 'Create New Connection' icon.
- iv) Configure the required details to create a data connection.

csv 3	Ð	Name	Connection-1	×
Connection-1 [C_1]	Î	Browse	Browse a CSV file	±
Excel	4	Load At Start	Yes No	0
Data Service	+	FIELD SET	CALCULATED FIELDS CON	IDITION
Predictive Service	+			
Data Store	+	Fields not ava	ilable !	
Web Socket	+			
Merged Data	+			

6.1. Connecting to a CSV File

Click the **'Data source'** icon provided to the right side of the canvas, and view the database connectivity options.

- i) Click the '**Data Connectors**' icon 🔤 to display all the available data connector types.
- ii) Click the '**Create New Connection**' icon + provided next to the '**CSV**' option.
- iii) A new connection gets added under the CSV connection type.





iv) Click the connection to display the connection specific details.

CSV	+	Name Connection-1	×	2
Connection-1	Î	Browse Browse a CSV file	Ť	
Excel	+	Load At Start Yes No		¢
Data Service	+	FIELD SET CALCULATED FIELDS CONDITION		t≡
Predictive Service	+			Ð
Data Store	+	Fields not available !		
Web Socket	+			
Merged Data	+			

- v) Configure the following information:
 - a. Name: Name the connection.
 - b. **Browse:** Click the '**Browse**' icon **1** to browse a CSV file.
 - c. **Load at Start:** Enable this option to get the updated data from the data source before loading into charts.
- vi) The 'FIELD SET' tab displays all the fields after establishing the data connection.



		×
Name	Connection-1	Browse a CSV file
Browse	DD Model Data(CSV).csv	<u>±</u>
Load At Start	Yes No	
FIELD SET	CALCULATED FIELDS CONDITION	
Employee		
Fri		
Mon		
Thu		

6.1.1. Condition

- i) Select the 'Condition' tab.
- ii) Provide a condition to be applied as a filter on the selected data by check marking the box.

E.g., As displayed in the following image, '**BU 6**' has been selected from the '**team**' field. _Hence, only data related to the team BU 6 will be pulled from the data source.

FIELD SET CALCULATED FIELDS	CONDITION	
Fields	Conditions	Actions
name		
offered_ctc		•
previous_ctc		•
previous_organisation		• 🗆
referral_of		•
skills		•
source		•
team	BU 6	▼ ✓
usd_billing		▼ □

6.1.2. Calculated Field

The users can add a calculated field by using this tab.

- i) Navigate to the Data Connectors page
- ii) Create a connection by selecting a specific Data Connector type
- iii) Connect to the desired data source to access the available fields
- iv) Click the 'Calculated Field' tab
- v) The Calculated Field Editor window opens
 - a. Provide a name for the calculated field
 - b. Use the Script Editor to insert the desired calculation through SDK script



c. Click the 'Create' option to create the calculated field

		Calculated field editor	×
	Name		
L	Name	CalcField1	
L	Script Editor		
L			
L			
			11
d	Example: {column2.s	ales}/2	
			Create Cancel

vi) The newly created calculated field gets added under the 'CALCULATED FIELDS' tab.

FIELD SET	CALCULATED FIELDS	CONDITION	
Calculated fie	lds		+
CalcField1			∕ ≣

6.1.3. Script on Load for a Data Connection

The users can apply their modifications or preferences at the connection level using the Scripting window to get the modified data.

- i) Navigate to the Data Connectors page
- ii) Select a Data Connector type
- iii) Create a new Connection and configure it
- iv) Select the 'Script on Load' $\stackrel{f}{\Box}$ icon provided next to the connection to trigger a script to produce some action on the data connection.



COMPONENTS	CONNECT	IONS	Script]	Default field values	(j) >	×	
		Q	1					
Connection-1	[C_1]							¢
		0						
								2
			Connection-1	Use	Ctrl+Space for assistance or visit help section for SDK meth	od details		

Note:

a. Click the information icon from the Script on Load page to display the Scripting Help.

8D8: Decision Platform 🗙 🖞 Dashbaard Designer 🗙 🗋 BizViz Dashboard Designer SDK 🛛 🛨 🕂	
C https://app.bdb.ai/designer/views/designer/resources/help/script_help.html	Q 🕁 🕒
Apps 🧊 YUJAA: platform 🗋 BDB: Decision Platfori 🎽 BDB: Decision Platfori	
Scripting Help	Advanced Scripting
1. Auto Reload	±
Method : sdk.autoReload()	
Arguments : Not required	
This method should be written on Filters/ Grids/ Charts. Those connections will be reloaded automatically which has the filter key in their condition	
2. Reload All Connections	±
Method : sdk.reloadAll()	
Arguments : Not required	
All connections will be reloaded	
3. Reload From List	±

b. Click the 'Advanced Scripting' option to display the chart wise advance scripts.

Scripting Help Advanced Scripting

Bar	arts - ackground					
De	Property	VariableName	Values	Description	Deprecated	Version
	Stack Border Color	m_stackbordercolor	any hexadecimal color	used to control stack border color of component	false	3.80
	Stack Border Width	m_stackborderwidth	any value from 0-20	used to control stack border width of component	false	3.80
	Stack Border Radius	m_stackborderradius	any value from 0-30	used to control stack radius color of component	false	3.80
Ge	eneral					
Buł	oble					
Fur	nels					
Ma	р					

6.2. Connecting to an Excel File

- i) Click the '**Data Connectors**' icon Storight to display all the available data sources.
- ii) Click the **'Create New Connection'** icon \pm provided next to the **'Excel'** option.
- iii) A new connection gets added under the Excel connection type.

CSV	+
Excel	+
Connection-1 [C_1]	Î
Data Service	+

iv) Click the connection to display the connection specific details.

CSV	+	Name	Connection-1	×	2
Excel	+	Browse	Browse an Excel file	<u>±</u>	
Connection-1	Î	Sheet Name		•	¢
Data Service	+	Load At Start	Yes No		t≡
Predictive Service	+	FIELD SET CALCULA	TED FIELDS CONDITION		Ð
Data Store	+				
Web Socket	+	Fields not available !			
Merged Data	+				

- v) Configure the following information:
 - a. Name: Name the connection.
 - b. **Browse:** Click the '**Browse**' icon ¹ to browse an Excel file.
 - c. Sheet Name: Select a specific sheet using the drop-down menu



- d. Load at Start: Enable this option to get the updated data from the data source before loading into charts.
- vi) The 'FIELD SET' tab displays all the fields after establishing the data connection.

1 Name	Connection-1	×
Browse	DD Model Data.xlsx	2 1
Sheet Name	Column	3-0
Load At Start	4 Yes No	
5 FIELD SET	CALCULATED FIELDS CONDITION	
Expense		
Revenue		
Year		

vii) Select the '**Condition**' tab and provide a condition to be applied as a filter on the selected data by check marking the box.

E.g., As displayed in the following image, '**2012**' has been selected from the '**Year**' field. Hence, only data related to the year 2012 will be pulled from the data source.

FIELD SET	CALCULATED FIELDS	CONDITION		
Fields	C	onditions		Actions
Expense			•	
Revenue			•	
Year	2	012	•	

viii) Select the '**Script on Load**' option to trigger a script to produce some action on the connection.

6.3. Connecting to a Data Service

- ii) Click the '**Create New Connection**' + icon provided next to the '**Data Service**' connector.
- iii) A new connection gets added under the Data Service connector type.



Excel	+
Data Service	+
Connection-1 [C_1]	Î
Predictive Service	+

iv) Click the connection to display the connection specific details.

CSV	+	Name	Connection-1	
Excel	+	Data Connectors	Select a connecto	or
Data Service	+	Data Services	Select a service	
Connection-1	Î	Load At Start	Yes	No
Predictive Service	+	Timely Refresh	Yes	No
Data Store	+	FIELD SET CALCUL	ATED FIELDS CO	ONDITION
Web Socket	+			
Merged Data	+			

- v) Configure the following information:
 - a. Name: Name the connection.
 - b. Data Connectors: Select a data source from the drop-down menu.
 - c. Data Services: Select a data service from the drop-down menu.
 - d. Load at Start: Enable this option to get up-to-date data / pull the updated data from the data source before loading into charts.
 - e. Timely Refresh: Enable this option to get the refreshed data.
 - f. **Refresh Interval:** Set the time for refresh interval. (This field will appear only when the '**Timely Refreshed**' field has been enabled.)
- vi) The 'FIELD SET' tab displays all the fields after establishing the data connection.



			×			
1	Name	Connection-1				
	Data Connectors	sample_test_hiring	2 C 🔽			
	Data Services	sq1				
	Load At Start	4 Yes No				
	Timely Refresh	5 Yes No				
6	Refresh Interval	5	Minute(s)			
7 FIELD SET CALCULATED FIELDS CONDITION						
	bill_start_date					
	candidate_id					
	comments					

Note:

- a. The users can filter the targeted data set using the '**CONDITION**' option and trigger a script to produce some action on the connection part using the '**Script on Load**' icon.
- b. Click the 'Reload Data Sources' icon to reload the existing data connectors.
- c. Click the 'Refresh Service' icon to refresh all the available data services.

6.4. Connecting to a Predictive Service

- ii) Click the '**Create New Connection**' + icon provided next to the '**Predictive Service**' connector.
- iii) A new connection gets added under the Predictive Service connector type.

Predictive Service	+
Connection-1 [C_1]	Î
Data Store	+

iv) Click the connection to display the connection specific details.



CSV	+	Name	Connection-1	×
Excel	+	Predictive Workflows	Select a workflow	G .
Data Service	+	Load At Start	Yes No	
Predictive Service	+	Timely Refresh	Yes No	
Connection-1	Î	FIELD SET CALCULA	TED FIELDS CONDITION	
Data Store	+			
Web Socket	+			
Merged Data	+			

- v) Configure the following information:
 - a. Name: Name the connection.
 - b. **Predictive Workflows:** Select a deployed Predictive Workflow from the drop-down menu.
 - c. **Load at Start:** Enable this option to get up-to-date data / pull the updated data from the data source before loading into charts.
 - d. Timely Refresh: Enable this option to get the refreshed data.
 - e. **Refresh Interval:** Set the time for refresh interval. (This field will appear only when the '**Timely Refreshed**' field has been enabled.)
- vi) The 'FIELD SET' tab displays all the fields after establishing the data connection.

1 Name	Predicted Source	×
Predictive Workflows	aggregate_hiring	2 C 🔽
Load At Start	3 Yes No	
Timely Refresh	4 Yes No	
5 Refresh Interval	5	Minute(s)
6 FIELD SET CALCU	JLATED FIELDS CONDITION	
PredictedSource		
SumBilling		
SumCount		

Note:

- a. The users can filter the targeted data set using the '**CONDITION**' option and trigger a script to produce some action on the connection part using the '**Script on Load**' icon.
- b. Click the '**Refresh Workflows**' icon to refresh the deployed Predictive Workflows.



6.5. Connecting to a Data Store

- i) Click the '**Data Connectors**' icon 🔤 to display all the available data sources.
- ii) Click the 'Create New Connection' + icon provided next to the 'Data Store' connector.
- iii) A new connection gets added under the Data Store connector type.

Data Store	(+)
Connection-1 [C_1]	Î
Web Socket	+

iv) Click the connection to display the connection specific details.

CSV	+	Name		Connection-1		×
Excel	+	Data Store		Select a con		Ç
Data Service	+	Load At Start		Yes	No	
Predictive Service	+	Timely Refresh		Yes	No	
Data Store	+	FIELD SET	CALCULATE	D FIELDS	CONDITION	
Connection-1	Î					
Web Socket	+					
Merged Data	+					

- v) Configure the following information:
 - a. Name: Provide a name for the connection.
 - b. Data Store: Select a data store from the drop-down menu.
 - c. **Load at Start:** Enable this option to get up-to-date data / pull the updated data from the data source before loading into charts.
 - d. Timely Refresh: Enable this option to get the refreshed data.
 - e. **Refresh Interval:** Set the time for refresh interval. (This field will appear only when the '**Timely Refreshed**' field has been enabled.)
- vi) The 'FIELD SET' tab displays all the fields after establishing the data connection.



0	Name	Connection-1	×
2	Data Store	PredictingSalary	G
	Load At Start	3 Yes No	
	Timely Refresh	4 Yes No	
5	Refresh Interval	5	Minute(s)
6	FIELD SET	CALCULATED FIELDS CONDITION	
	actual_joining	_date	
	candidate_id		
	comments		
	current_status	5	

Note:

- a. The users can filter the targeted data set using the '**CONDITION**' option and trigger a script to produce some action on the connection part using the '**Script on Load**' icon.
- b. Click the 'Refresh Data Stores' icon to refresh the available Data Stores.

6.6. Connecting to a Websocket

- i) Click the **'Data Connectors'** icon
- ii) Click the 'Create New Connection' + icon provided next to the 'Websocket' connector.
- iii) A new connection gets added under the Data Store connector type.

Web Socket	(+)
Connection-1 [C_1]	Î
Merged Data	+

iv) Click the connection to display the connection specific details.

CSV	+	Name	Connection-1	:	×
Excel	+	URL	WebSocket URL		
Data Service	+	Load At Start	Yes	No	
Predictive Service	+				
Data Store	+				
Web Socket	+				
Connection-1	Î				
Merged Data	+				



- v) Configure the following information:
 - a. Name: Provide a name for the connection
 - b. **URL:** Enter a URL link
 - c. Load at Start: Enable this option to get up-to-date data / pull the updated data from the data source before loading into charts.

CSV	+	Name	Connection-1	× 🛃
Excel	+	URL	wss:///websocket/ws	
Data Service	+	Load At Start	Yes No	¢
Predictive Service	+			t≡
Data Store	+			Ð
Web Socket	+			
Connection-1 [C_1]	2			
Merged Data	+			

vi) The websocket connection gets established.

6.7. Connecting to a Merged Data

- i) Click the 'Data Connectors' 🐸 icon
- ii) Create new connections using any data connector option (In this case, Excel connections are created. E.g., Connection-1, Connection-2)
- iii) Create a connection under the 'Merged Data' connector. (E.g., Connection-3)
- iv) Configure the new connection created for Merged data by mapping the created Excel connections.
- v) Define a condition via the drop-down menu in the Criteria space. (E.g. 'Equal' or 'Not Equal')
- vi) Click the 'Create Criteria' icon.
- vii) The Merged Fields displays all the data fields from the merged connections.

Excel	+	Name	Connection-3		· · · · · · · · · · · · · · · · · · ·
Connection-1 [C_1]	Î	Connection-1 Asia	5 Equal	Connection-2 Expense 	6 🗸 x 🚺
Connection-2 [C_2]	Î	Connection-1		7 Merged Fields	
Data Service	+	Asia Europe		Asia	×
Predictive Service	+	NorthAmerica		Europe	×
Data Store	+	Year		NorthAmerica	×
Web Socket	+	Connection-2 Expense	•	Year	×
Merged Data	+	Revenue		Expense	×
Connection-3	Î	Year		Revenue	×

Note:

a. Users can remove the fields added to the merged data connection using the 'Remove' imes icon.



b. After clicking the 'Create Criteria' icon, the created criteria gets added to space.

		X
Name	Connection-3	(j)
C_1.Asia==C_2.Expense		+

6.7.1. Deleting a Data Connection

The users can delete a created connection using the following steps:

- i) Navigate to the Data Connector page.
- ii) Select a data connection.
- iii) Click the '**Delete**' icon.
- iv) A message window appears to assure the action.
- v) Click the '**Yes**' option to delete the connection.

CSV	+	Name	Delete Connection	×	
Connection-1 [C_1]	2	Browse			
Excel	+	Load At Start	Do you want to delete this connection?		
Data Service	+	FIELD SET			
Predictive Service	+			Yes No	
Data Store	+	Fields not ava	ailable !		_

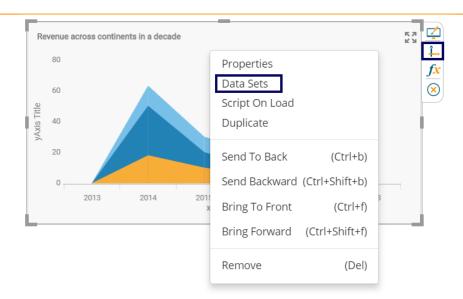
vi) The selected data connection gets deleted from the Data Connectors page.

6.7.2. Connecting Data Set Connection to a Dashboard Component

- i) Navigate to the Dashboard Canvas.
- ii) Select and drag a dashboard component into the canvas.
- iii) Click the '**Data Set**' icon OR

Right click on the dashboard component and click the 'Data Sets' option.





iv) Users will be directed to the Dataset Palette.

6.7.2.1. Dataset Palette

The Dataset Palette is the window that can be used to configure the dataset fields of a component. Each field has several properties which can be set using this palette.

- a. Map a data connection using the drop-down menu. (Ref. 'Connecting to a Data Source' section)
- b. Drag and drop the required fields as described below:
 - 1. Category: it takes the fields selected as dimensions for the component.
 - 2. Series: it takes the fields selected as measures for the component.
- c. Configure the 'Properties' displayed at the bottom of the window.

-	Area1	$\swarrow f_x \times$
_	Connections Conr	nection-1 • C
2	Search Asia Europe NorthAmerica Year	Category Year Series Asia
	3 Pro	perties
	Field Name :	Asia
	Display Name :	Asia
	Visible :	
	Color :	
	Point Shape :	Point 🔻
	Line Width :	2
	Line Type :	Straight 🔻
	Point Radius :	3
	Opacity :	1
	Data Label :	\$

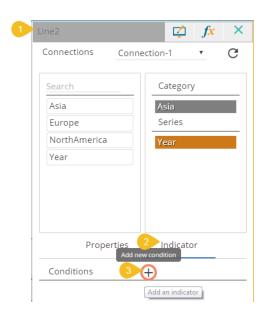


6.7.2.2. Indicator Tab

The Dataset Palette displays Indicators tab together with Properties for some components like

Line, Grid. The users can add various data conditions by using the Indicator tab.

- i) Navigate to the Dataset Palette for the selected range of the charting components that contains Indicator tab.
- ii) Navigate to the Indicator tab.
- iii) Click the 'Add new Condition' icon.

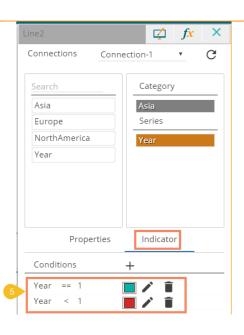


- iv) The Conditional Color window appears
 - 1. Choose a condition by selecting a compared field, Operator, Compare to fields
 - 2. Set a color for the condition
 - 3. Click the '**Create**' option

Condit	ional Colo	r[Year]				×
Fixed valu	ie comparison			~		
Field	Compared	d Field	Oper	ator	Compare To	Color
Year	Year	-		-	1	
					Create	Cancel

v) The created Conditions gets added to the Indicator tab





7. Components

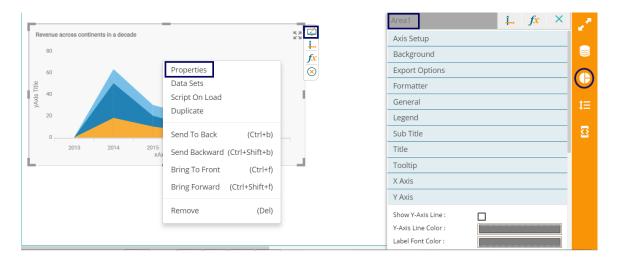
The components are the elements like charts, tables, gauges, metrics which are used to create a dashboard. Users need to drag and drop the components in the canvas and connect them with a data source. Each component contains appearance properties to be configured which differs as per the component type.

This category includes properties that focus on the appearance of a component.

- i) Navigate to the Designer Canvas.
- ii) Click the **'Component Library**' 🕒 icon from the right edge of the window.
- iii) Select and drag a component in the canvas.
- iv) Click the '**Properties**' icon 📿 OR

Use Right-click on a component and click the 'Properties' option.

v) The Appearance Properties of the dragged component gets displayed on the right side of the screen.





Note: The component properties are explained at length in a separate document.

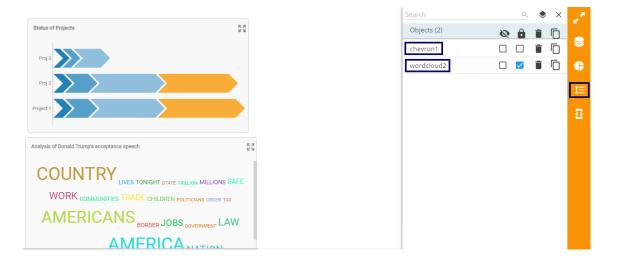
8. Dashboard Objects

Every component in the dashboard is considered as an object. Object browsers have properties which are used to lock, hide, delete, duplicate, and arrange components on the dashboard.

8.1. Manage Dashboard Components

Every component which is dragged into the canvas will have its properties displayed in the Manage Component browser window. Click the '**Manage Dashboard Components**' icon 筐 to display the browser window for the dragged Designer components.

E.g. The following image displays two components on the Dashboard (i.e., Chevron and Wordcloud), so the object properties related to those components are displayed in a panel right side. Enable checkmarks in the checkboxes \checkmark or click on the concerned icon to perform the related action.



8.1.1. Dashboard Object Properties

- i) **Hide All** : By clicking on this icon all the components which are present in the dashboard will be hidden. Users can hide the individual components by enabling the checkbox revided next to the name of the component.
- ii) Lock All [■]: By clicking on this icon all the components which are present in the dashboard will be locked, i.e., means components cannot be moved from one place to another. Users can lock the components individually by enabling the checkbox [♥] provided next to the name of the component.
- iii) Remove : By Clicking on this icon all the components which are present in the dashboard can be deleted. Users can delete the components individually by clicking the remove icon provided next to the name of the component.
- iv) **Duplicate** : By clicking on this option duplicate component gets produced on the canvas.



v) **Search:** When the component number increase in the dashboard it will be difficult for users to find out the desired component. The '**Search**' bar can be used then to search for the desired components.



9. Data Drill-Down

To drill down deeper into data, the users require to use attributes and values of the components that have been dragged onto the canvas. The data drill-down functionality can be achieved in the following ways:

- a) Passing Default Values (Manual Filter)
- b) Performing Dynamic Filtering (through SDK methods)

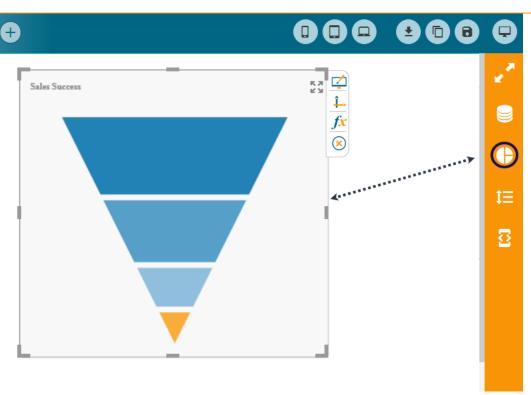
9.1. Passing Default Values

This section aims to explain how to pass default values in the charts.

E.g., Assume that we have Sales data of some organization. In this example, we would pass only data of **the years 2014 and 2015**. In the given scenario, we need to perform the following steps:

i) Select a charting component and drag it into the canvas. (in this case, we have dragged a funnel chart)





- ii) Connect an Excel data source of sales data. (Refer to section 7.2. for creating a data source connection using Excel File).
- iii) Click on Funnel chart's data source connection and select the '**Condition**' tab and provide input as '**2014**, **2015**' in the condition textbox (as shown below)

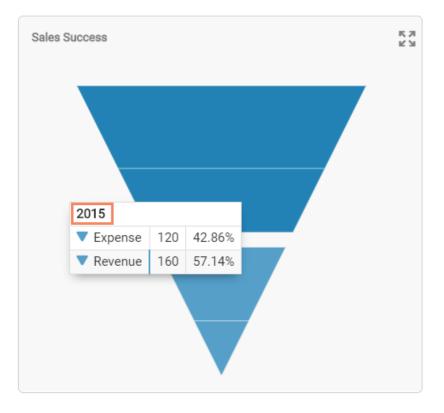
CSV	+	Name	Sa	ales Data				×	2
Excel	+	Browse	D	D Model Da	ta.xlsx			±	\bigcirc
Sales Data [C_1]	Î	Sheet Name	C	Column				•	¢
Columnchart [C_2]	Î	Load At Start	_	Yes	No				t≡
Data Service	+	FIELD SET	CALCULATED	FIELDS	CONDITION				2
Predictive Service	+			-		-			
Data Store	+	Fields		Cor	nditions		Actions		
Web Socket	+	Expense				•			
Married Data		Revenue				•			
Merged Data	+	Year		201	4,2015	•	~		

- iv) Click the '**Preview**' 🖵 icon to view the results.
- v) Only data for the years 2014 and 2015 get displayed as per the given condition.











Copyright © 2015-19 BDB

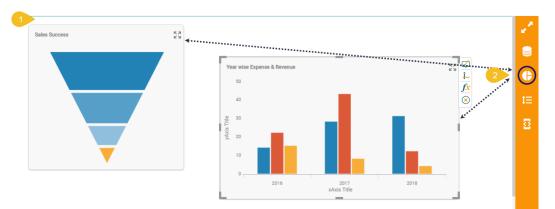


9.2. Performing Dynamic Filtering

This section explains how to perform dynamic filtering using filters and charts. Every component has some attributes and values which can be seen in **'Component Attributes'** window. By passing values of one component into another component, dynamic filtering is achieved.

Scenario: Performing dynamic filtering using a Funnel chart to Column chart

- i) Navigate to the Designer canvas.
- ii) Drag two charting components to the designer canvas using the '**Component Library**' icon (In this case, Funnel and Column charts are dragged to the canvas).



iii) Connect an Excel data source of sales data. (Refer to section 7.2. for creating a data source connection using Excel File).

Note: Use a single data set for both the connections so that they contain the same data while using the data drill.

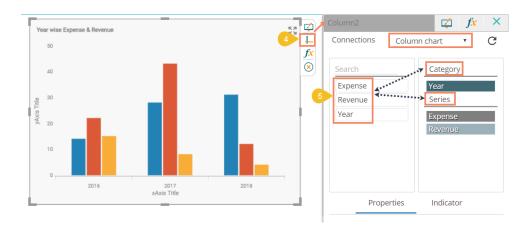
	CSV	+	Name	Column chart				×	2
3	Excel	+	Browse	DD Model Dat				±	
	Funnel chart [C_1]	Î	Sheet Name	Column				*	•
	Column chart [C_2]	Î	Load At Start	Yes	No				t≡
	Data Service	+	FIELD SET	CALCULATED FIELDS	CONDITION				8
	Predictive Service	+		-				- 1	
	Data Store	+	Fields	Con	nditions		Actions		
			Expense			-		11	
	Web Socket	+	Revenue			-			
	Merged Data https://app.bdb.ai/designer/views/designer/des	+	Year			•			

- iv) Connect the created data connectors to the respective charting components using the Data Set icon.
- v) Configure the required Dataset Palette fields as shown below:
 - a. Do the required configurations for the Funnel chart-



	Funnel1	$\not \subseteq f_x \times$
Sales Success	Connections	Funnel chart 🔹 🕑
	Search Expense Revenue Year	Category Year Series Expense Revenue Properties

b. Do the required configuration for the Column chart-



- vi) Click the **'Component Variables and Script'** icon provided to the right side of the canvas.
- vii) Select the Funnel component.
- viii) Follow the below mentioned steps to write the function name:
 - a. Type '**sdk.**' in the given space.
 - b. Use 'Ctrl+Space' keys.
 - c. A function list appears.
 - d. Select the auto reload function from the pop-up list and use double clicks to add it in the script tab.

	COMPONENTS	CONNECTIONS				Script	Default field values	(j)	×	200
			Q	8 1	sdk.autoReload();					
	Dashboard		ø							¢
7	Funnel1 [funnel1]	∔.⊈							t≡
	Column2 [column2]							6	3

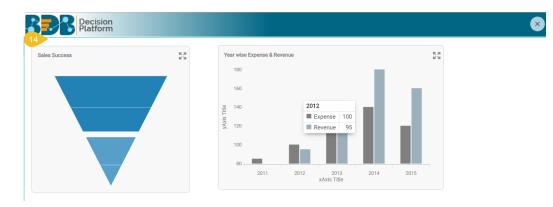
ix) Select the 'Data Source' icon



- x) Select the data connection details displayed for the Column chart on the right side of the window.
- xi) Click the 'Condition' option.
- xii) Select the field name using which filtering will be performed (E.g., In this case, using 'Year' field we are performing the drill-down action) and pass the condition that connects the Column chart with the Funnel chart (E.g., In this case, {funnel1.year} is used).
- xiii) Enable the 'Actions' checkbox. (as shown in the following image)

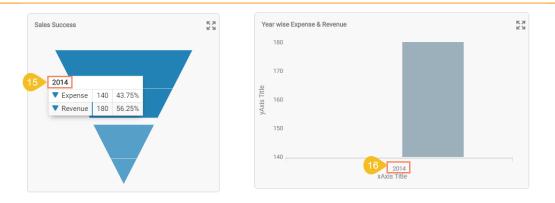
Name	10 Column chart		×	2
Browse	DD Model Data.xlsx		<u>1</u> 9	0
Sheet Name	Column		٣	¢
Load At Start	Yes No			t≡
FIELD SET				8
Fields	Conditions	Actions		
Expense		-		
Revenue		▼		
Year	12 {funnel1.Year}	- 13 ⊘		

xiv) Click the 'Preview' icon to open the preview mode for the concerned components.



- xv) Select a specific year value using the Pie-chart.
- xvi) The sales information of the selected year displays via the Column chart.





10. Scripting Window

BDB offers scripting mechanism in the Designer plugin to help the users experience next level of customization in dashboard creation. BDB offers script support at the component level to display the intended UI actions and at the data connection level to apply data related back-end changes. The scripting mechanism makes the creation of complex dashboards easy and quick. The users require basic scripting knowledge to create dashboards using the BDB Designer tool.

This section aims to provide a basic understanding of writing scripts and their functionality. **Scenario**: We wish to have a checkbox which when enabled displays a column chart, and when disabled, shows an area chart. This concept is called **Dynamic Visibility**.

- i) Navigate to the Designer homepage.
- ii) Select the 'Dashboard' option using the New drop-down menu to create a new dashboard.



- iii) The dashboard canvass opens for the Untitled Dashboard.
- iv) Click the 'Component Library' icon.
- v) Drag and drop the 'Checkbox,' 'Column Chart', and 'Area Chart' components into the canvas.
- vi) Click on the 'Properties' icon next to the Checkbox component.





vii) Set **Checked Value to '1'** and **Unchecked Value to '0'** (as shown below) using '**General**' properties tab of the Checkbox component.

1	Checkbox1	fx ×
	Background	
	General	
	Component Name :	checkbox1
	Left :	75
	Top :	55
	Height :	25
	Width :	130
	Initial Visibility :	
	Show Checked :	
	Label :	Label
	Font Color :	
	Font Size :	12
	Font Style :	Normal 🔻
	Font Weight :	Normal 🔻
	Font Family :	Roboto 🔻
	Chrome Color :	
	Opacity :	1
	Checked Value :	1
	Unchecked Value :	0

- viii) Create data connections for the Column chart and Area chart. (**Ref. Connecting Data Set** Connection to a Dashboard Component).
- ix) Click on the **'Script on Load'** icon f provided next to the Checkbox component.



~	Sales Figure		Ø
		-	fx
			⊗

x) The script window for the Checkbox component opens

COMPONENTS	CONNECTIONS				Script		Default field values	i	×	28
		Q	1							
Dashboard		⊈								¢
Area2	[area2]									t≡
Column3	[column3]									8
Checkbox3	[checkbox3	⊈								1
				checkbox3		Use Ctrl+Space for as	istance or visit help section for :	SDK method de	tails	

- xi) Write the relevant script for the action mentioned above as explained in the following steps:
 - a. Write the if statement for the script following the order of "changedItem.attributes.Value"
 - b. Pass 'Value==1' (In other words, it suggests that checkbox is enabled)

COMPONENTS	CONNECTIONS			Script	Default field values	í	×
	Ş	Q	1	if(changedItem.attributes.Value==1)			
Dashboard		⊉					
Area2	[area2]						
Column3	[column3]						
Checkbox3	[checkbox3	⊈					
				Checkbox3 Use	Ctrl+Space for assistance or visit help section for SDK method	d detai	ls

- c. Either click the '**Help**' icon ⁽ⁱ⁾ or use '**Ctrl+Space'** keys to get the assistance in writing the script.
- d. The 'Designer Scripting Help' window opens.



^

	Scripting Help	Advanced Scripting
1. Auto Reload		±
Method : sdk.autoReload() Arguments : Not required This method should be written on Filters/ Grids/ Charts. Those connections will be rele	paded automatically which has the f	ilter key in their condition
2. Reload All Connections		Ŧ
Method : sdk.reloadAll()		
Arguments : Not required		

e. Select the '**Show and Hide**' function as per the requirement from the Designer Scripting Help window.

5. Hide Component(s)	±
Method : sdk.hideComponent(["bar_1", "column_2"]) Arguments : An array of component id's. Here bar 1 and column 2 are the component id's	
Method : sdk.hideComponent("bar_1")	
Argument : Component id as string (Used to hide single component)	
6. Show Component(s)	±
Method : sdk.showComponent(["bar_1", "column_2"])	
Arguments : an array of component id's. Here bar_1 and column_2 are the component id's	
Method : sdk.showComponent("bar_1")	

- f. If the 'Value == 1' (in other words, if the Checkbox is enabled) the Column chart should be displayed. For this to occur,
- g. Place the 'Show Component' function under the 'if' function.
- h. Pass Area chart value to the 'Show Component' function.
- i. Pass Column chart value to the '**Hide Component**' function to make sure that the Column chart will be hidden when the Area chart is displayed.

COMPONENTS	CONNECTIONS		Script Default f	ield values i	×
Dashboard		<u>ू</u>	<pre>if(changedItem.attributes.Value==1) 2 { 3 sdk.hideComponent(['area2']); 4 sdk.showComponent(['column3']);</pre>		
Area2	[area2]		5)		
Column3	[column3]				
Checkbox3	[checkbox3	¢	checkbox3 Use Ctrl+Space for assistance or visit	help section for SDK method det	tails

Scripting Help Advanced Scripting



j. If the 'Value == 0' (in other words, if the checkbox is disabled), we need to do the reverse of the function that we used earlier. So that when users uncheck Check Box, the 'Area chart' will be displayed and 'Column chart' will be hidden.

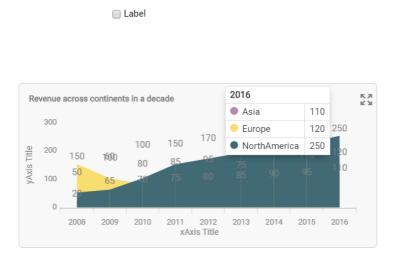
To accomplish this, users need to write the highlighted portion of the script:

COMPONENTS	CONNECTIONS		Script	Default field values (i) X
Dashboard		Q ⊉	<pre>1 if(changedItem.attributes.Value==1) 2 { 3 sdk.hideComponent(['area2']); 4 sdk.showComponent(['column3']); 5 }</pre>	
Area2	[area2]		6 else 7 {	
Column3	[column3]		<pre>8 sdk.showComponent(['area2']); 9 sdk.hideComponent(['column3']); </pre>	
Checkbox3	[checkbox3	ø	10 }	
			Checkbox3 Use Ctri+	+Space for assistance or visit help section for SDK method details

- xii) After entering the above script successfully, click the '**Preview**' icon 😾 to view the results. xiii) In the below screen capture, since the 'Checkbox' is checked, the 'Column chart' is displayed.
 - к 7 2 У Year wise Expense & Revenue 180 160 yAxis Title 140 120 100 80 2011 2012 2013 xAxis Title 2014 2015
- xiv) By unchecking the 'Checkbox' displays the 'Area chart.'

🖌 Label





11. Managing Options

Manage and share your work with others. This section explains how to edit, save, and publish the dashboards created by users.

Generally created dashboards are saved under a workspace. Based upon requirement the users can edit the dashboards by adding some modifications and saving them to the disk. This tutorial explains how to edit, open, and save dashboards.

Created dashboards will be shared among the users for a purpose. There are options provided to move and publish dashboards.

The Below given description helps you how to access those options in the Designer.

- i) Navigate to the Designer homepage.
- ii) Click the 'Manage' option.
- iii) A list of 'Workspaces' gets displayed.
- iv) Choose a workspace.
- v) Displays a list of all the saved dashboards under the selected workspace.
- vi) Options provided next to a dashboard name can be used to manage or move that dashboard.

N - 2								1
	Workspaces (2) (⊕ C	4	Dashboards (3)				Q
nage	All Dashboards		5	hide/show option 6	F	6	Î	:
en from Local Disk	Workspace1	1		Hide and Show	ſ.	0	Î	:
ferences	Campaign Analytics		-	Language Manning		•		:
e as	campaign Analytics		•				•	•
p	Trash		×					
1								
	en from Local Disk 3 ferences e as	e as Campaign Analytics Campaign Analytics Trash	e as Trash	en from Local Disk 3 Workspace1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	en from Local Disk 3 Workspace1 Image: Transh in busined rds image: Transh image: Transh	en from Local Disk Workspace1 Image and Show ferences Campaign Analytics Image Mapping Trash Image Mapping	en from Local Disk 3 Workspace1 Image and Show Image and Show ferences Campaign Analytics Image and Show Image Analytics b Trash Image Analytics Image Analytics	e as Trash

Options provided to a Dashboard:



Option	Name	Description			
I ↑	Open in Designer	To open a created dashboard in the designer canvas.			
\mathbf{O}	Publish to Portal	tal To publish a created dashboard onto the portal.			
Î	Remove	To remove the dashboard from the list of saved dashboards.			
:	Actions	To provide more actions to be applied to the selected dashboard.			

Explaining the Actions Menu:

Option	Name	Description
Ţ	Preview	Opens preview for the selected dashboard
₽	Export to Local Disk	Exports the dashboard to a local disk
	Rename	Renames the dashboard
A 1	Move To	Moves the dashboard

Note: Users can also use the 'Manage' option to manage the created workspaces.

- i) Click the '**Rename**' *icon* provided next to a workspace to rename the workspace.
- ii) Click the '**Trash**' **i** icon to remove a workspace from the list.

11.1. Opening a Dashboard

The users can open the desired dashboard into the designer workspace once they have created and saved it to a workspace.

- i) Click the 'Manage' option on the Designer homepage.
- ii) Select and click on a workspace from the list of Workspaces.
- iii) Select a Dashboard from the list of all the saved dashboards under the selected workspace.
- iv) Click the '**Open in Designer**' 🖬 icon.

Workspaces (2)	Ð	G	Q	Dashboards (2)		Q
All Dashboards			3	Hide and Show	Î	:
Workspace1				Language Mapping	Î	:
Compaign Analytics			-			
Campaign Analytics			•			
Trash			×			
	Workspace1 Campaign Analytics	Workspace1	Workspace1	Workspace1 Campaign Analytics	Workspace1 / I Language Mapping I 🗘	Workspace1 Campaign Analytics

v) The selected dashboard opens in the designer workspace.



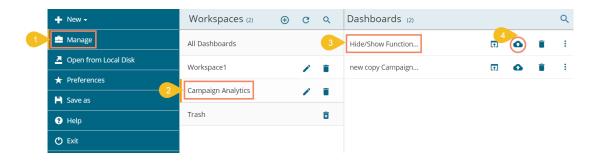
Platform 1 Home (Hide and x)	Ŧ						
							2
Label fx							
8							¢
Revenue across continents in a decade	к я К Я	Y	Year wise Expense & Revenue			K 3	t≡
80 60 40 20 0 2013 2014 2015 2016 2017 2018 XAXis Title	1	vAxis Title	40	2017 xAxis Title	2018		5

Note: The users can also open a dashboard in the designer canvas by using double clicks on the dashboard name from the list of saved dashboards.

11.2. Publishing a Dashboard

Dashboards need to be published for end-users to access them. This section explains the steps to publish dashboards.

- i) Click the 'Manage' option on the Designer homepage.
- ii) Select and click on a workspace from the list of Workspaces.
- iii) Select a Dashboard from the list of all the saved dashboards under the selected workspace.
- iv) Click the 'Publish to Portal' 🏠 icon.

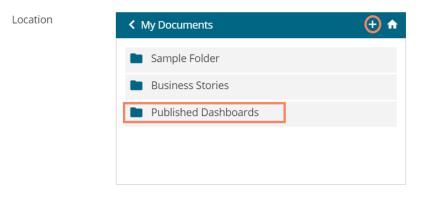


- v) A pop-up window appears to assure the action.
 - a. Dashboard name and description get displayed in the pop-up window.
 - b. Select a location using the following steps:
 - i. Choose a Documents space



5 Publish		×
Name Description	Hide/Show Functionality Published from dashboard designer	
Location	< Home My Documents Public Documents	4
	System Documents	ncel

ii. Choose a folder or create a new folder (E.g., Published Dashboards is a newly added folder using the 🛨 icon).



- iii. Navigate to the 'Published Dashboards' folder.
- iv. Click the 'Publish' option to confirm the action.

Location	Published Dashboards		+ 🏫
		Publish	Cancel



vi) Two success messages appear to assure the completion of the action.



vii) The selected dashboard gets published in the desired place.

Decision Platform	
My Documents > Publis	hed Dashboards 🗲
10 13 CO	

Note: For the published dashboard, the below given pop-up window will appear while clicking

the '**Publish to Portal**' **o** icon.

- i) Select an option out of 'Re-Publish' or 'Publish As New.'
- ii) Click 'Publish' to complete the action.

e	Publish		×
	Name	Hide and Show	
	Description	Published from dashboard des	signer
			<i>h</i>
	Action	Re-publish	O Publish As New
	This dashboard is already pul	olished to "My Documents->Sample Folder-	
ŀ			
I,			Publish Cancel



11.3. Deleting a Dashboard

Users can delete a dashboard by following the steps explained over here.

- i) Click the 'Manage' option on the Dashboard Designer home page.
- ii) Select and click on a workspace from the list of all the Workspaces.
- iii) Select a Dashboard from the list of all the created dashboards under the selected workspace.

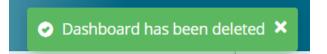
	+ New -	Workspaces (2)	Ð	C	Q	Dashboards (2)				Q
1	🚔 Manage	All Dashboards			3	Hide and Show	T	4		:
	Open from Local Disk	Workspace1		1	Î	Language Mapping	ſſ	0	Î	:
	★ Preferences				-					
	💾 Save as	Campaign Analytics		/	Î					
	🔋 Help	Trash			×					
	🖒 Exit									

iv) Click the '**Delete**' 📕 icon.

- v) A pop-up window appears to confirm the deletion.
- vi) Select the 'Remove' option from the pop-up window.

ad	Remove ×
arc	
1 \n	Are you sure to remove the dashboard "Hide and Show"?
-	
l,	Remove Cancel

- vii) The selected dashboard gets removed from the list.
- viii) A message appears to notify the completion of the action.



11.3.1. Restoring the Deleted Dashboard

By default, the dashboard gets moved to the Trash Workspace. The users can open the Trash Workspace and restore the dashboard to the desired workspace.

- i) Click the 'Manage' option from the Designer homepage.
- ii) Navigate to the 'Trash' workspace created under the list of all the workspaces.
- iii) Select a deleted dashboard that you want to restore and click the '**Restore**' **D** icon.

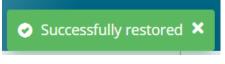


+ New -	Workspaces (2)	Ð	C	Q	Dashboards (1)		Q
🚔 Manage	All Dashboards				Hide and Show	٥	Î
Open from Local Disk	Workspace1			Î			
★ Preferences							
💾 Save as	Campaign Analytics			Î			
Help	Trash			×			
🖒 Exit							

- iv) A new window appears.
 - i. Select a workspace using the drop-down menu.
 - ii. Click the 'Restore' option.

Restore			×
Workspace	Workspace1		0
- 1	Vorkspacer		
		Restore	Cancel

v) A success message appears to assure the restoration.



vi) The dashboard gets restored to the selected workspace.

+ New -	Workspaces (2)	Ð	G	Q	Dashboards (2)				Q
🚔 Manage	All Dashboards				Hide and Show	ħ	•	Î	:
Open from Local Disk	Workspace1		1	Î	Language Mapping	ſŢ	0	Î	:
★ Preferences	Campaign Analytics								
💾 Save as				-					
 Help 	Trash			×					
🖒 Exit									

11.4. Actions

The Actions menu contains some more options like Preview, Export to Local Disk, Rename and Move to that can be applied on the dashboards.

11.4.1. Renaming a Dashboard in Designer

Previously created dashboards can be renamed using this option. This part provides stepson how to rename an existing dashboard.



- i) Click the 'Manage' option on the Designer homepage.
- ii) Select and click on a workspace from the list of Workspaces.
- iii) Select a Dashboard from the list of all the saved dashboards under the selected workspace.
- iv) Click the 'Actions' icon.

	+ New -	Workspaces (2)	\oplus	C	Q	Dashboards (3)			A	tions
0	🚊 Manage	All Dashboards			3	hide/show option	F	6	4	:
	Open from Local Disk	Workspace1		/	1	Hide and Show	F.	•		:
	★ Preferences	Campaign Analytics			ĩ	Language Mapping	(T)	•		:
	🗎 Save as	campaign Analytics			•	canguage mapping	CTJ		•	•
	Help	Trash			×					
	🕐 Exit									

- v) A context menu opens by clicking the 'Actions' option.
- vi) Click the 'Rename' 🖍 icon

5	Preview	Ţ
	Export To Local Disk	Ŧ
6	Rename	
	Move To	

- vii) A new window appears to rename the dashboard.
 - a. Enter a new name for the selected dashboard.
 - b. Click the 'Rename' option to save the new name.

Rename		×
rc		
Hide/Show Funtionality		
.n.		
	Rename	Cancel

viii) The selected dashboard gets renamed successfully.



Workspaces (2)	Ð	C	Q	Dashboards (3)				Q
All Dashboards			8	Hide/Show Function	ſſ	6	Î	:
Workspace1		1	Î	Hide and Show	ſ	•	Î	:
Campaign Analytics		1	Î	Language Mapping	ſſ	0	Ĩ	:
Trash			×					

11.4.2. Moving a Dashboard

Users can move the created dashboards from one workspace to other using this option. This section explains steps to move dashboards.

- i) Click the 'Manage' option on the Dashboard Designer homepage.
- ii) Select and click on a workspace from the list of all the Workspaces.
- iii) Select a Dashboard from the list of all the created dashboards under the selected workspace.
- iv) Click the 'Actions' icon.

	+ New -	Workspaces (2)	Ð	C	Q	Dashboards (3)				Q
1	🖆 Manage	All Dashboards			3	Hide/Show Function	ſ.	0	4	:
	Open from Local Disk	Workspace1		/	Î	Hide and Show	Ţ.	6	Î	÷
	★ Preferences	Campaign Analytics			-	Language Mapping	Ŧ	•	-	:
	💾 Save as	Campaign Analytics			Î		LTJ		•	•
-	🕄 Help	Trash			×					
-	🖒 Exit									

- v) A pop-up window appears to assure the action.
 - a. Select a Workspace from the drop-down menu.
 - b. Click the 'Move' option to move the selected dashboard into the desired workspace.

5	Move To An	other Workspace		×
rc n	Workspace	Campaign Analytics		O
			Move	Cancel

vi) The dashboard gets moved to the selected Workspace.



Workspaces (2)	Ð	С	Q	Dashboards (2)				Q
All Dashboards			6	Hide/Show Function	ħ	0	Î	:
Workspace1		1	Î	new copy Campaign	ſ	0		:
Campaign Analytics		/	Ē					
Trash			×					

Note: Other two options provided under Actions are explained as below:

- a. The 'Preview' option opens the selected dashboard in the preview mode.
- b. The 'Export to Local Disk' option can export/download the dashboard to the local disk.

12. Saving a Dashboard

Users are provided with multiple options to save a dashboard. All the '**Save**' options are provided on the Header menu bar provided on the Designer Workspace. This section explains all the available options to save a dashboard.



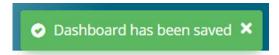
12.1. Save

- i) Click the '**Save**' 🔂 icon from the Designer canvas header menu.
- ii) A pop-up window appears with the following details:
 - a. Dashboard Name: Name of the selected dashboard gets displayed.
 - b. Workspace: Select a workspace via the drop-down menu.
 - c. Click the 'Save' option.



Save Dashboard		×
1 Dashboard Name	Hide and Show	
2 Workspace	Workspace1	0 C
	Export Save	Cancel

d. A success message appears to assure the same.



e. The dashboard gets saved to the selected workspace.

All Dashboards Hide and Show Workspace1 Image Mapping	:
Workspace1 🖍 👔 Language Mapping 🕞 🛆 📋	
	:
Campaign Analytics 🧪 📋	
Trash 😨	

Note: Click the 'Export' option from the Save Dashboard window to download the selected dashboard.

12.2. Save to Another Workspace

- i) Click the 'Save to Another Workspace' 🔲 icon from the Designer canvas header menu.
- ii) The 'Save As' pop-up window appears asking to save a copy of the selected dashboard.
 - a. Name: The dashboard name gets displayed as 'Copy_of_ the original Dashboard Name.'
 - b. Workspace: Select a workspace from the workspace drop-down menu.
 - c. Click the 'Save' option.

Save As		×
1 Name	Copy_Of_Hide and Show	
2 Workspace	Campaign Analytics	O C
	3 Save	Cancel

iii) A copy of the selected dashboard gets saved in another workspace.



Workspaces (2)	\oplus	C	Q	Dashboards (3)				Q
All Dashboards				Copy_Of_Hide and S	ſſ	4	Î	:
Workspace1		1	Î	Hide/Show Function	ſ	0	Î	:
Campaign Analytics		/	Î	new copy Campaign	ſ	0	Î	:
Trash			×					

12.3. Save to Local Disk

Dashboard which is created by users can be saved to local disk via 'Save to Local Disk' option.

- i) Click the 'Save to Local Disk' 불 icon from the Designer canvas header menu.
- ii) The selected dashboard will be saved to the local system.

Decision Platform	f Home	Hide and X Hide and X +	28
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			t≡
			8
Hide and Show (1).bvzx ^			Show all X

13. Signing Out

The signing out process for the Designer involves two level as described below:

Closing the BizViz Dashboard Designer:

Once you have completed creating a dashboard, save your work and use one of the following options to close the Designer.

• Click the **'Exit'** option provided on the Designer homepage.

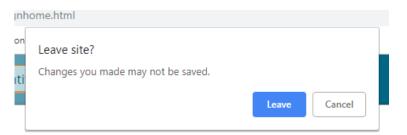


🕂 New 🗸			
🚊 Manage			
Open from Local Disk			
★ Preferences			
H Save as			
Help			
🕐 Exit			

• Click the 'Close' button (the 'X' on the right edge) of the Dashboard Designer tab



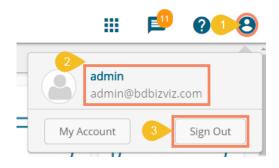
If you have not saved your work, you will be given the option to stay on the page or leave. If you have not yet saved your work, select 'Stay on Page' and then save your work before exiting the page.



• Steps to Sign Out from the BDB Platform.

The following steps describe how to log out from the BDB Platform.

- i) Click the '**User**' icon 😌 on the Platform homepage.
- ii) The details of the logged in user appears.
- iii) Click the 'Sign Out' option.



iv) The user successfully signs off from the **BDB Platform.**

Note: Clicking on the 'Sign Out' option redirects the user back to the Log in page of the BDB platform.



