

# User Guide

Dashboard Designer- 4.5

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# 1. About this Guide

## 1.1. Document History

Product Version	Date (Release date)	Description
Dashboard Designer 1.0	June 20 <sup>th</sup> , 2015	First Release of the document
Dashboard Designer 2.0	Feb 18 <sup>th</sup> , 2016	Updated document
Dashboard Designer 2.5	Nov 9 <sup>th</sup> , 2016	Updated document
Dashboard Designer 2.5.3	March 16 <sup>th</sup> , 2017	Updated document
Dashboard Designer 3.0	August 31 <sup>st</sup> , 2017	Updated document
Dashboard Designer 3.2	February 2 <sup>nd</sup> , 2018	Updated document
Dashboard Designer 3.5	April 15 <sup>th</sup> , 2018	Updated document
Dashboard Designer 3.5.1	July 5 <sup>th</sup> , 2018	Updated document
Dashboard Designer 3.6	August 20 <sup>th</sup> , 2018	Updated document
Dashboard Designer 3.7	October 10 <sup>th</sup> , 2018	Updated document
Dashboard Designer 3.8	December 1 <sup>st</sup> , 2018	Updated document
Dashboard Designer 4.0	December 31 <sup>st</sup> , 2018	Updated document
Dashboard Designer 4.2	March 25 <sup>th</sup> , 2019	Updated document
Dashboard Designer 4.3	April 24 <sup>th</sup> , 2019	Updated document
Dashboard Designer 4.4	June 7 <sup>th</sup> , 2019	Updated document
Dashboard Designer 4.5	August 5 <sup>th</sup> , 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

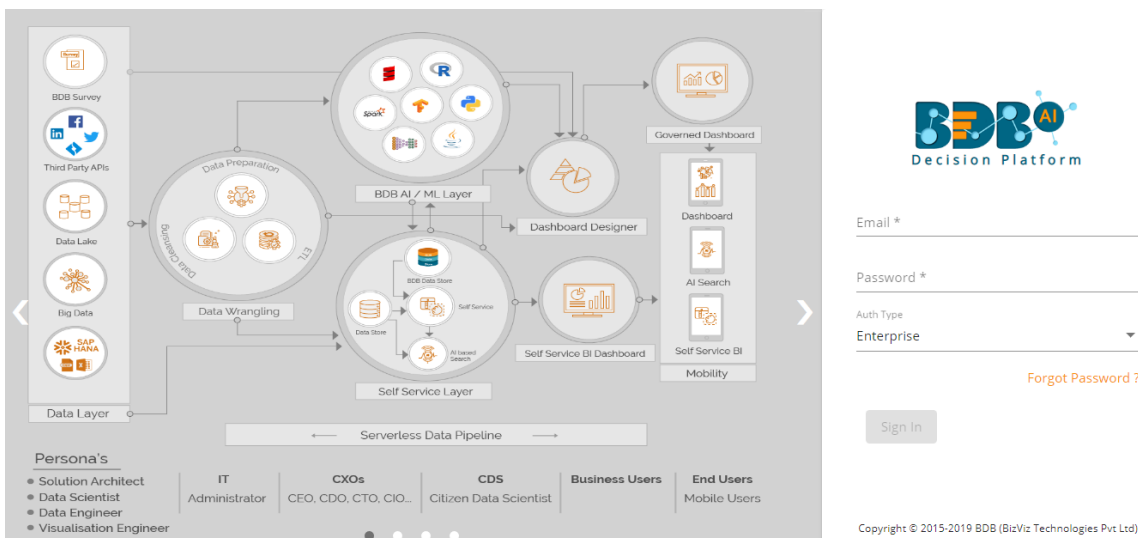
The BDB Platform is a web browser-based application. The users can run the BDB Platform and its various plugins on the below given versions of the browsers:

<b>Mozilla Firefox/ Firefox ESR</b>	<b>Latest Version</b>
<b>Microsoft Edge</b>	Latest Version
<b>Apple Safari</b>	10
<b>Google Chrome</b>	Latest Version (recommended web browser)

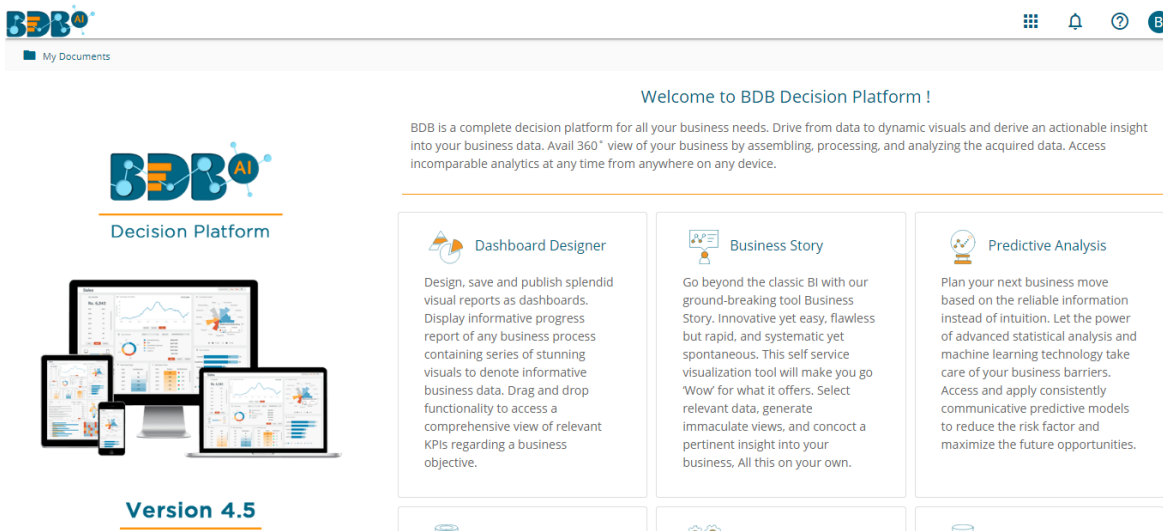
## 2. Getting Started with BDB Dashboard Designer

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) Select an Auth Type from the drop-down list.
- iv) Click the 'Sign In' option.

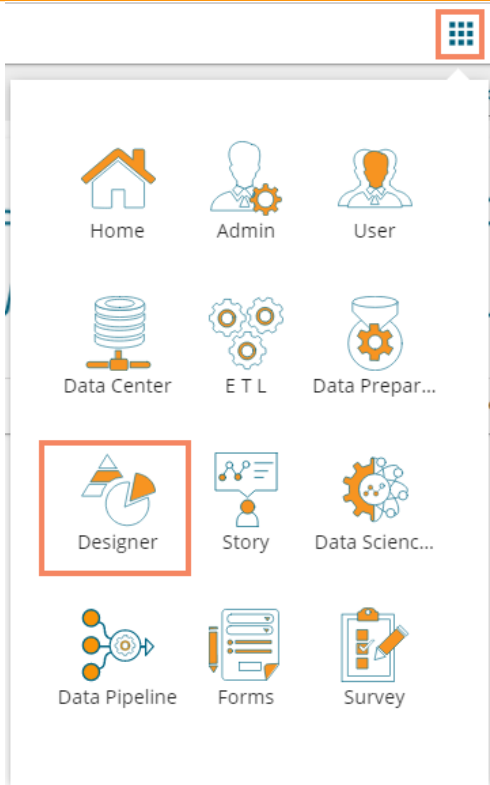


- v) BDB Platform homepage opens.

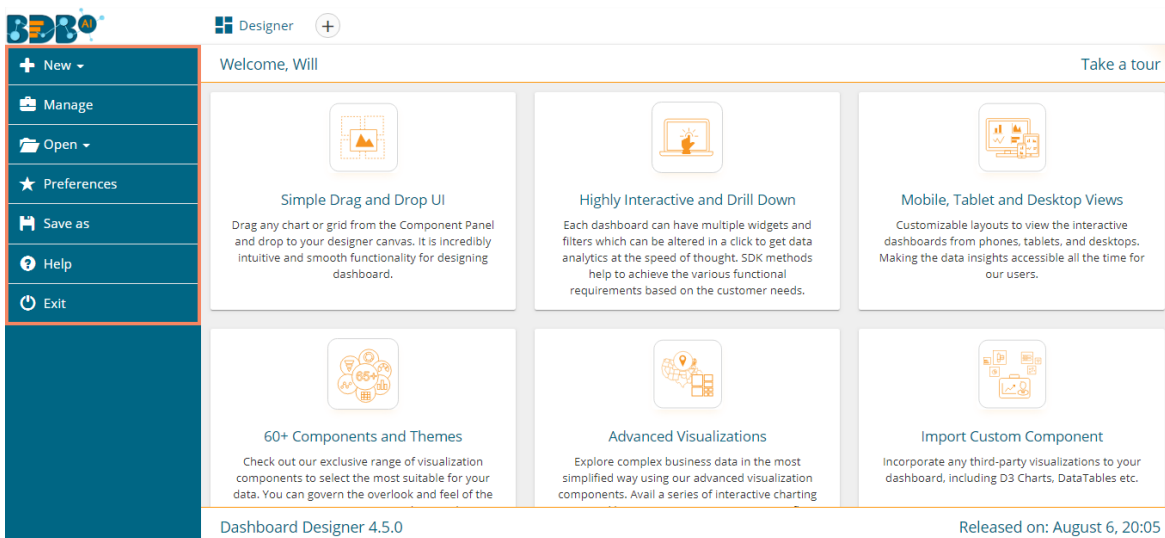


Note: The above screen opens only for those newly created users who have not yet created any document using the BDB Platform.

- vi) Click the 'App' menu button.
- vii) Select the 'Designer' plugin from the app menu.

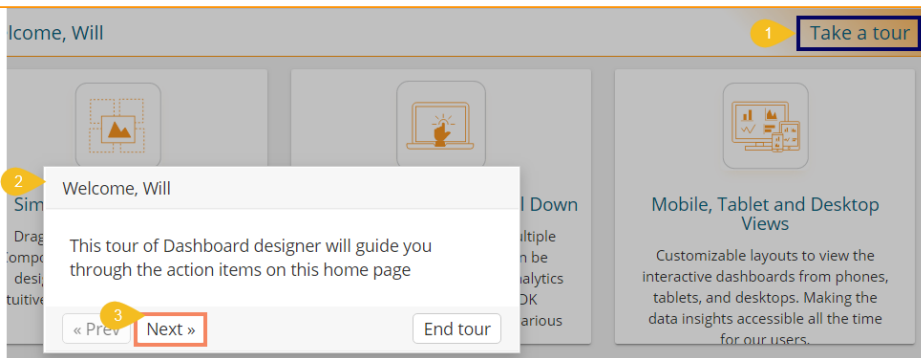


viii) A new window opens displaying the landing page for the Designer.



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

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



## 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 the '**Forgot your password?**' option.

- 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.



### Having trouble signing in?

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.)

Password reset Link has been sent to your mail.

- 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.



### Reset Password

You've confirmed ownership of the BizViz Account, Reset your password now to regain access.

New Password \*

\*\*\*\*\*

Confirm New Password \*

\*\*\*\*\*

Continue

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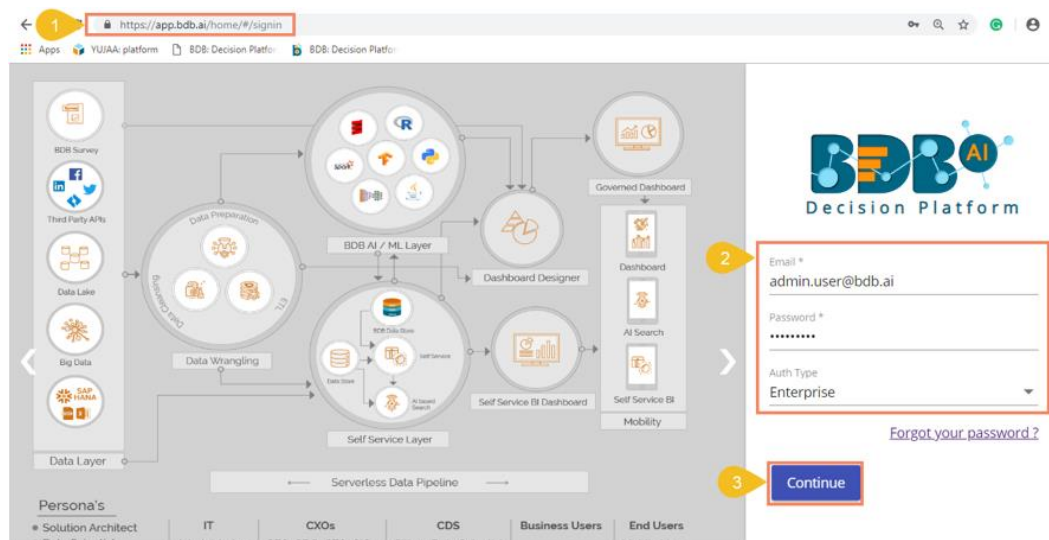
- xii) The password for the selected BDB account gets reset.



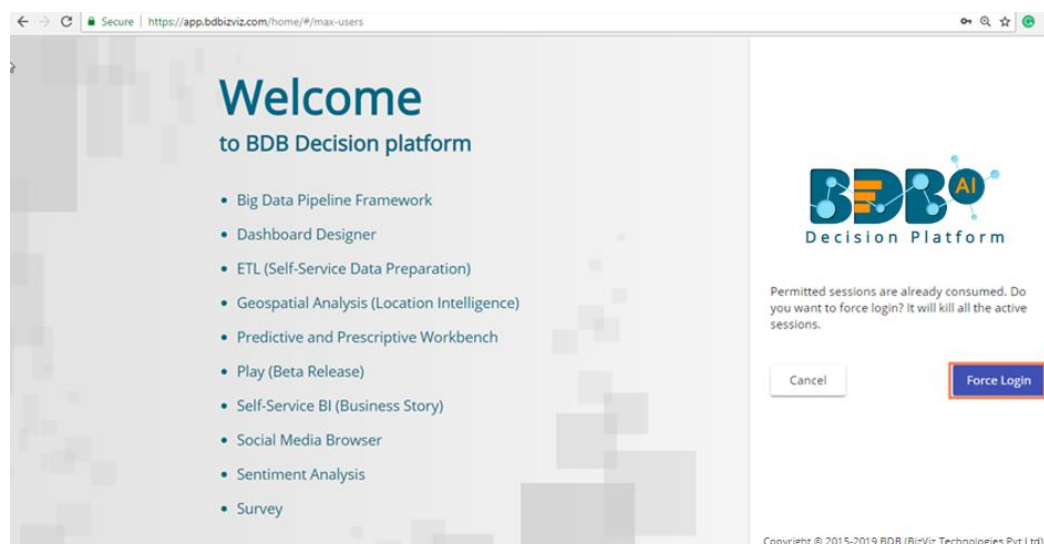
## 2.2. Force Login

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 4<sup>th</sup> 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.



- 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.

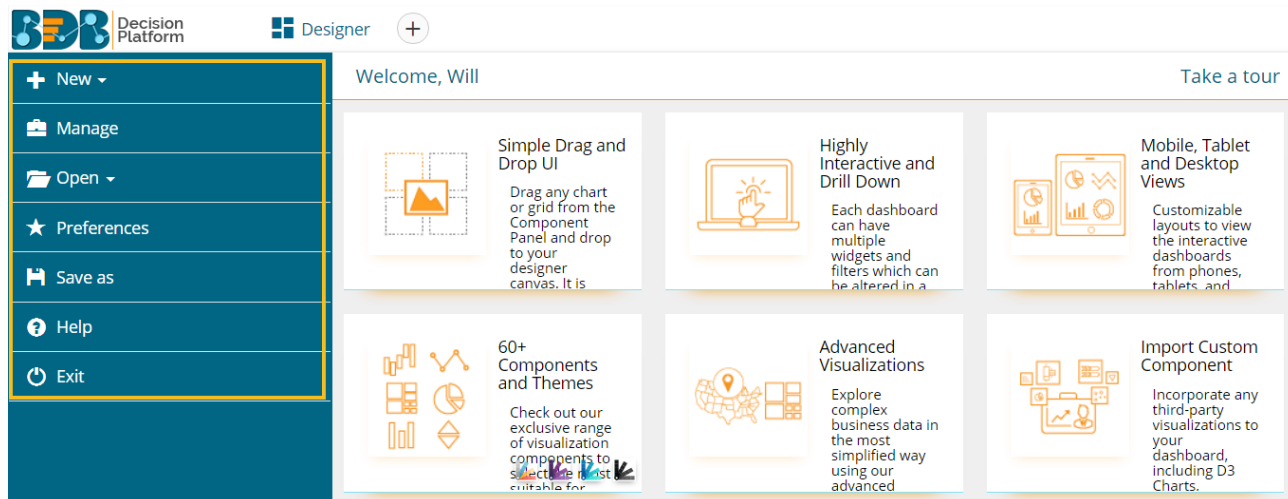


- vi) A warning message appears that the currently active sessions are killed for the user and the user is redirected to the **'Log In'** page of the BDB Platform.

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

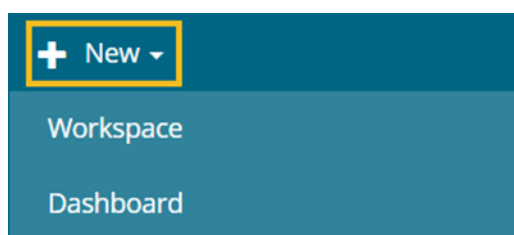
The Designer homepage displays a list of tasks in the left panel that users can perform on a dashboard. The users can add a new Dashboard/Workspace, Manage the existing Dashboard(s)/Workspace(s), set preferences for a dashboard, save the dashboard with a different name or open it from the local disk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



### 3.1. New

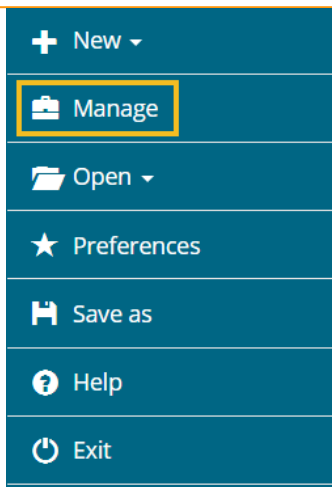
This option directs users to create a new workspace or dashboard.

- i) Navigate to the Designer homepage.
- ii) Click the 'New' drop-down menu.
- iii) The user gets 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.

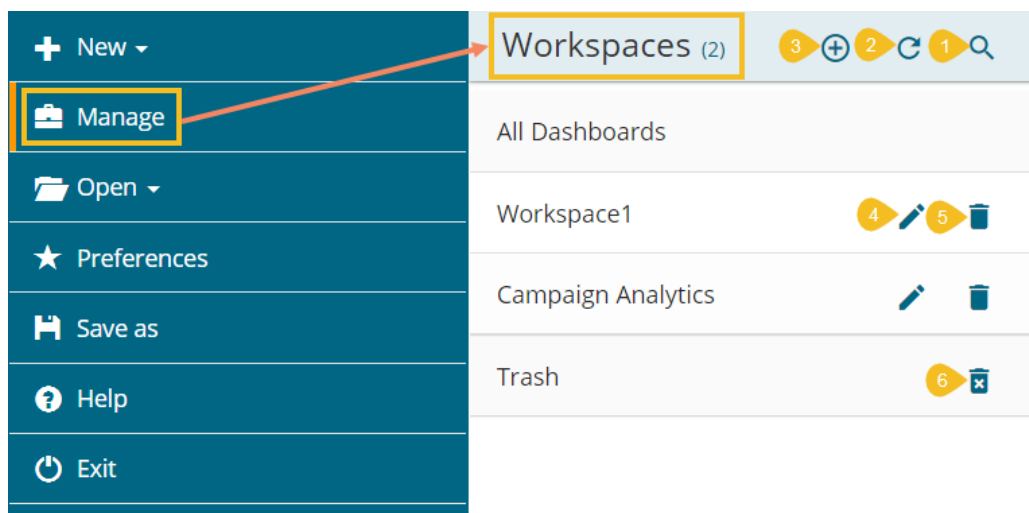


### 3.2. Manage

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



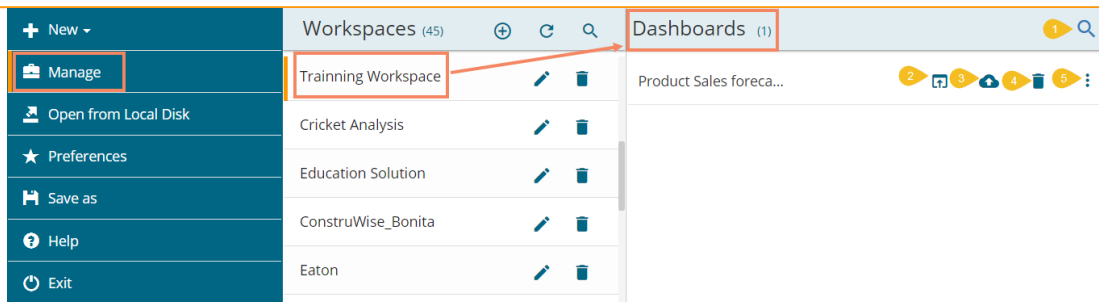
- iii) The user gets directed to manage the following tasks for a Workspace or Dashboard:
  - a. Tasks for a Workspace
    - i. Search in Workspaces: Searches for a specific Workspace
    - ii. Reload Workspaces: Reloads all the Workspaces
    - iii. New Workspace: Adds a new Workspace
    - iv. Rename: Renames the selected workspace
    - v. Remove: Removes the selected workspace from the list and moves to the 'Trash' Workspace
    - vi. Empty the Trash: Removes all the workspaces from the Trash workspace



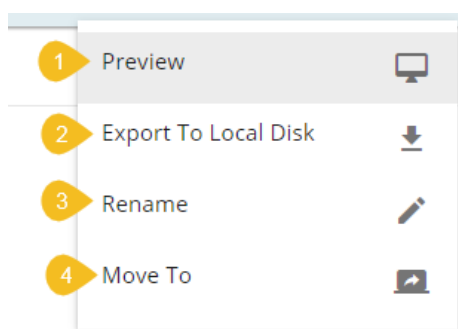
- b. Tasks for a Dashboard
 

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

  - i. Search: Searches for a Dashboard
  - ii. Open in Designer: Opens the dashboard in Designer to Edit or modify
  - iii. Publish to Portal: Publishes the Dashboard to the portal
  - iv. Remove: Deletes the Dashboard
  - v. Actions- Applies the various actions on a dashboard



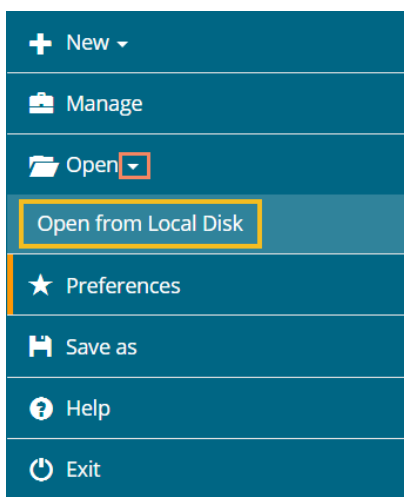
- c. Users get the following options while clicking the Action icon provided for a Dashboard.
- i. Preview the dashboard
  - ii. Export to Local Disk
  - iii. Rename the Dashboard
  - iv. Move the Dashboard from one Workspace to another Workspace



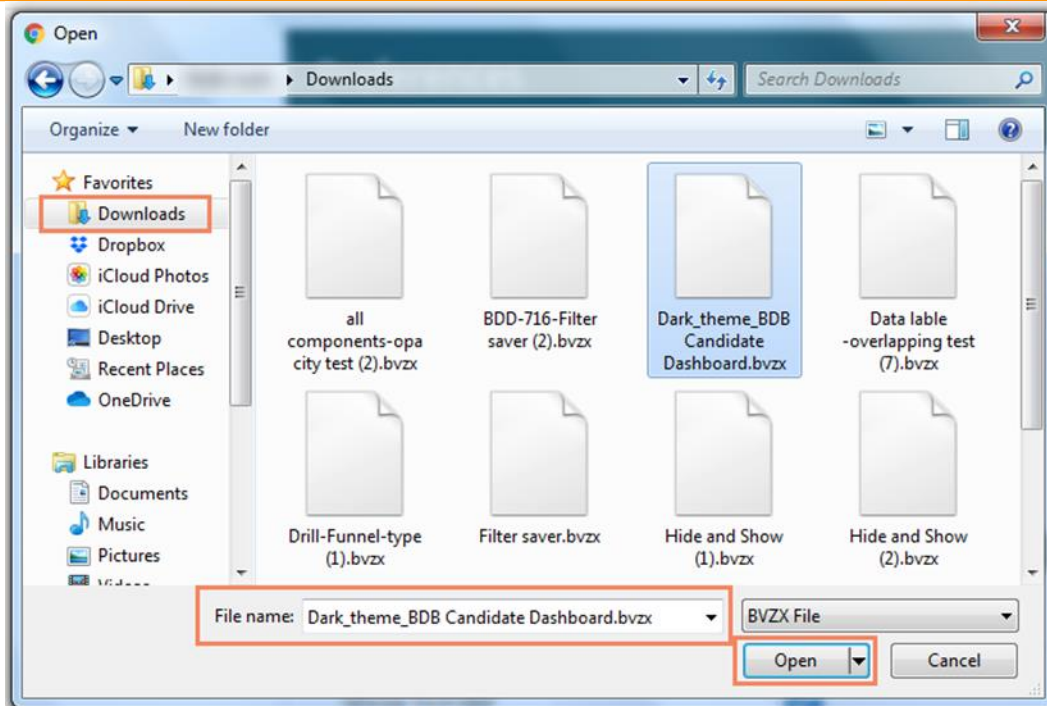
Note: The '**Manage**' options are explained at detailed under Section 4 (for Workspace) and 11 (for Dashboard) of this document.

### 3.3. Open

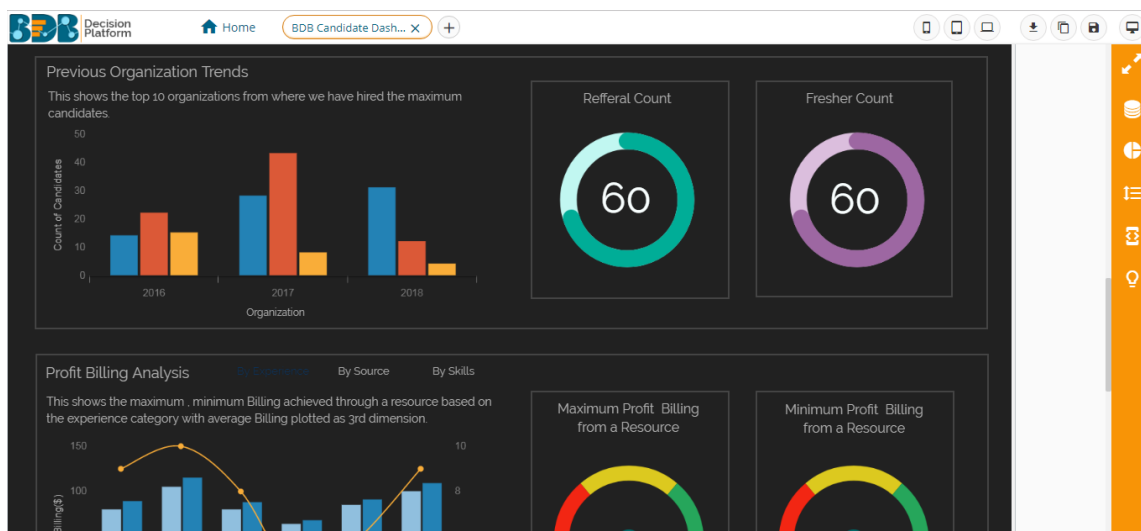
- i) Navigate to the Designer homepage.
- ii) Click the '**Open**' option from the given options.
- iii) The '**Open from Local Disk**' appears.



- iv) The user gets directed to open the downloaded files (.bvzx) from the local disk.

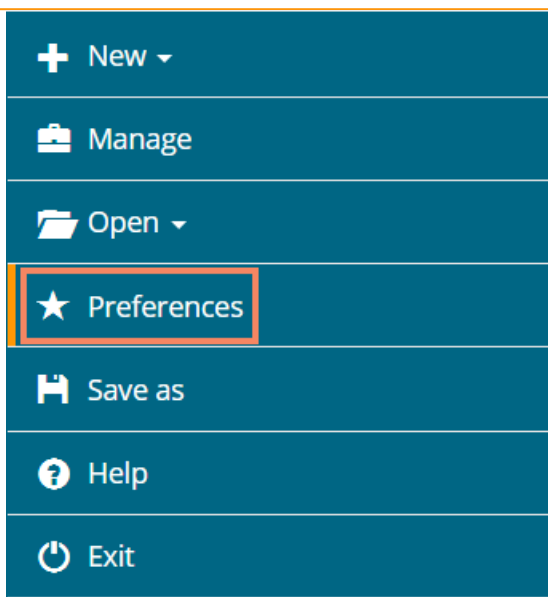


v) The selected dashboard (.bvzx file) opens inside the designer workspace.

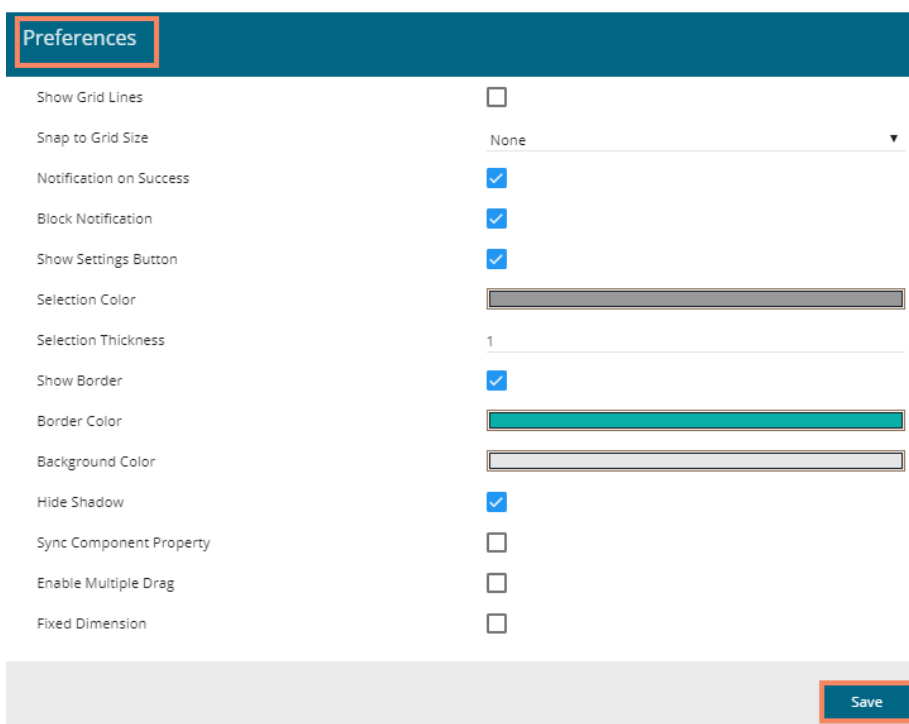


### 3.4. Preferences

- i) Navigate to the Designer homepage.
- ii) Click the **'Preferences'** option from the left panel.



- iii) The Preferences for dashboard canvass appear.
- iv) Set the desired preferences and click the 'Save' option.

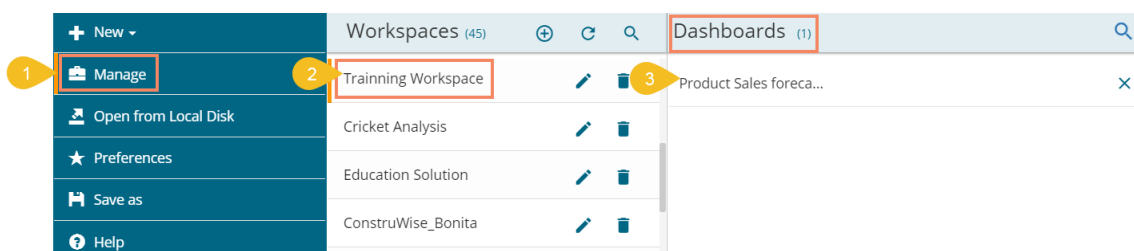


- v) The selected preferences get applied to the dashboard canvass.
- vi) The available preferences for a dashboard are as described below:

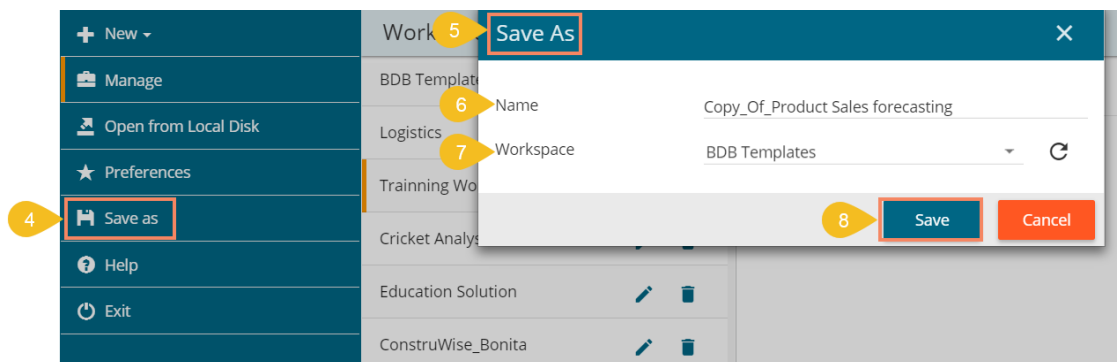
Property Name	Description
Show Grid Lines	Enable this option to display grid lines in the designer area
Snap to Grid Size	Select an option to display the grid size (None/5/10/15)
Notify on Success	Enable this option to get a notification on success
Block Notification	Enable this option to block the notification message
Show Settings Button	Enable this option to display toolbar when any component is selected
Selection Color	Redirects to 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	Redirects to select a border color to display in the Dashboard
Background Color	Redirects to select a color to display in the dashboard background
Hide Shadow	Enable this option to hide the shadow of the components
Sync Component Property	Enable this option to synchronize the component property
Enable Multiple Drag	Enable this option to select multiple charts and then move them together in the dashboard
Fixed Dimension	Enable this option to set fixed height & width of the dashboard

### 3.5. Save As

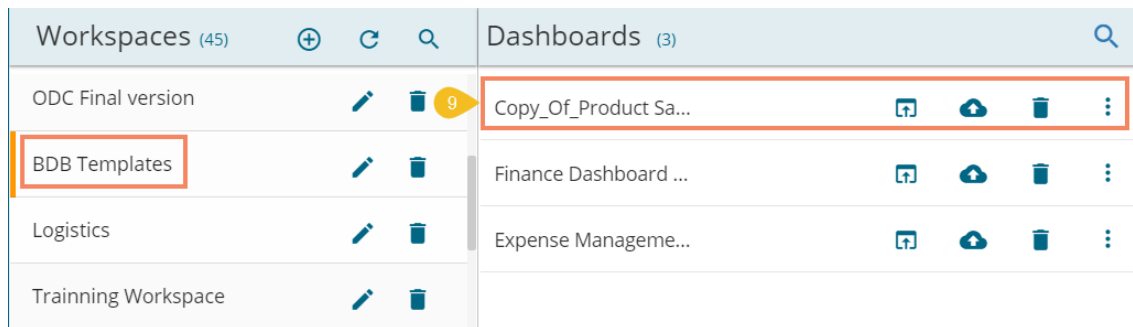
- i) Navigate to the Designer homepage.
- ii) Open a new dashboard using the **'Manage'** option or select an existing dashboard from the list of available dashboards.



- iii) Click the **'Save As'** option from the left panel.
- iv) A pop-up window appears to confirm the action.
  - a. Original dashboard name appears with the "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.

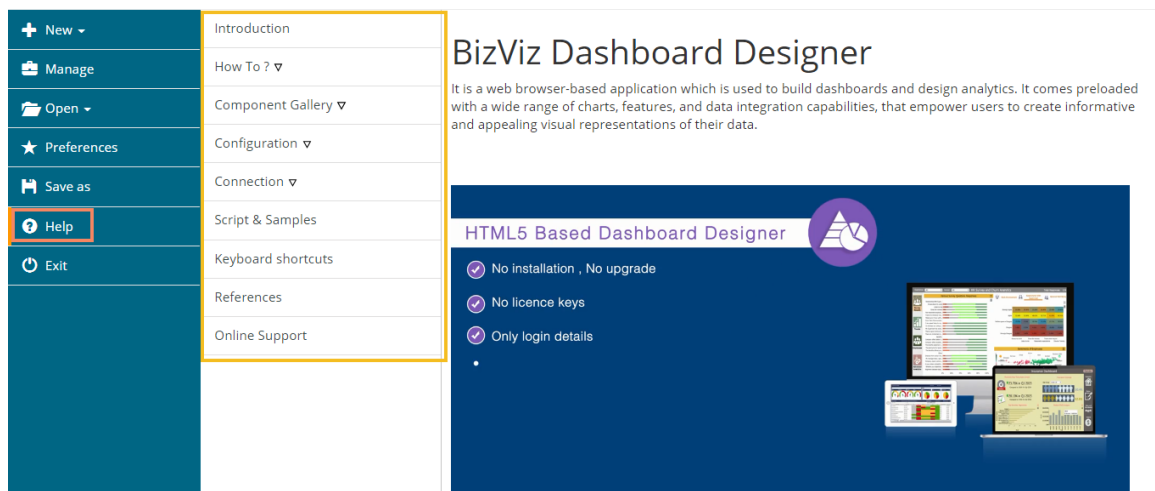


v) A copy of the selected dashboard gets saved in the chosen workspace.



### 3.6. Help

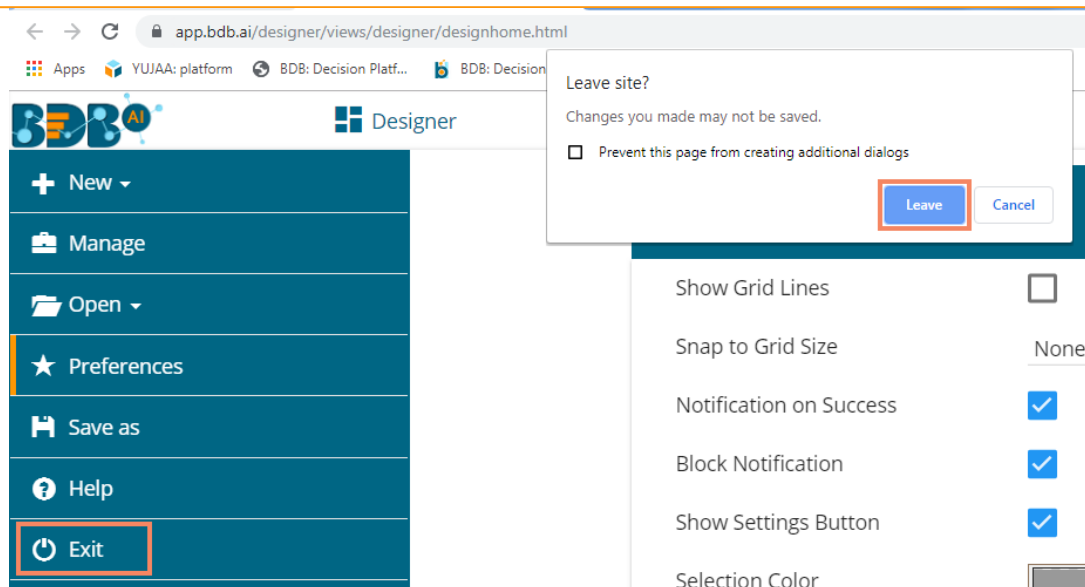
- i) Navigate to the Designer homepage.
- ii) Click the 'Help' option.
- iii) The Help content gets displayed to understand the Designer plugin.



### 3.7. Exit

- i) Navigate to the Designer homepage.
- ii) Click the 'Exit' option.
- iii) If work is not saved, the user gets 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

The user gets directed to the BizViz Platform homepage.

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



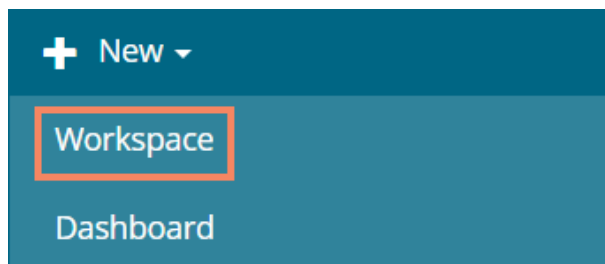
The user gets directed to the BDB Platform home page after closing the designer application.

## 4. Workspace

### 4.1. Creating a Workspace

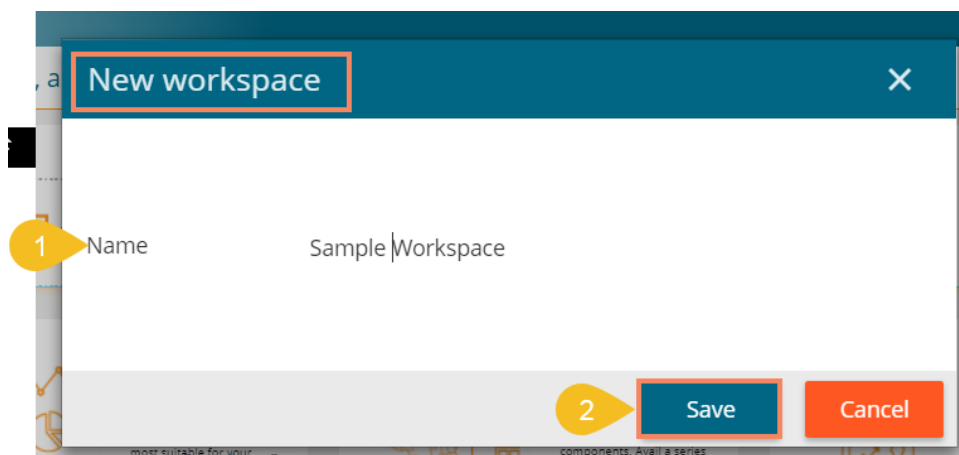
A Workspace is the place holder where users can save multiple dashboards.

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

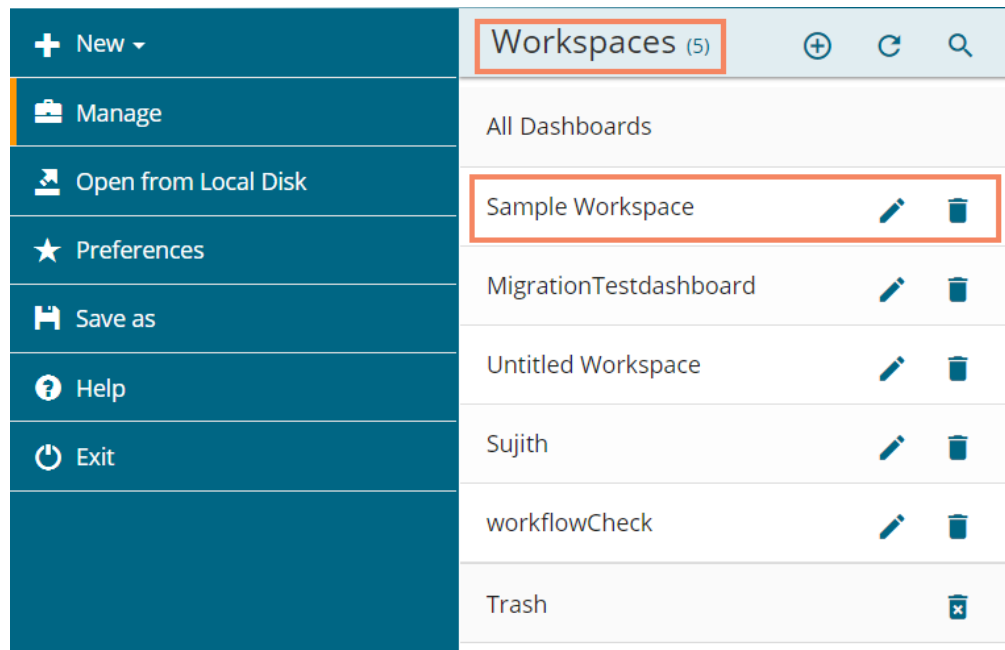


- iv) A dialog box appears.

- a. **Workspace Name:** Enter a title for the Workspace in the given field.
- b. Click the **'Save'** option.

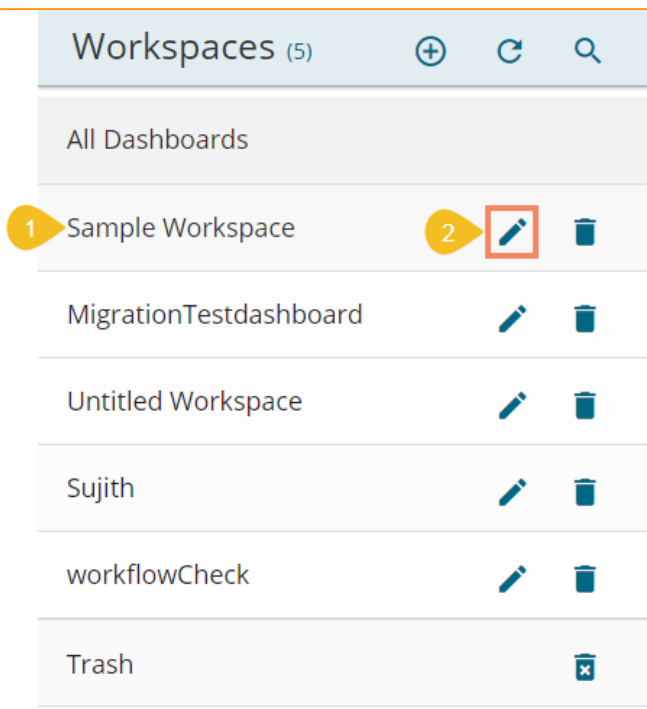


- v) The newly created workspace gets saved under the list of the existing **Workspaces**.

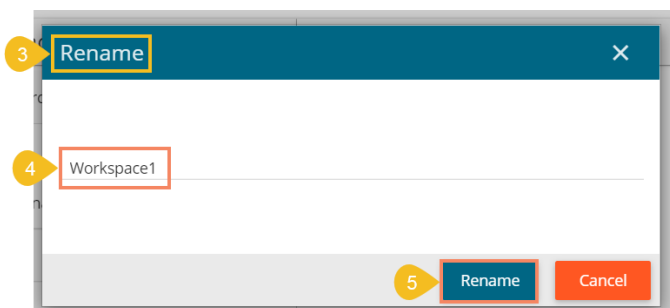


## 4.2. Renaming a Workspace

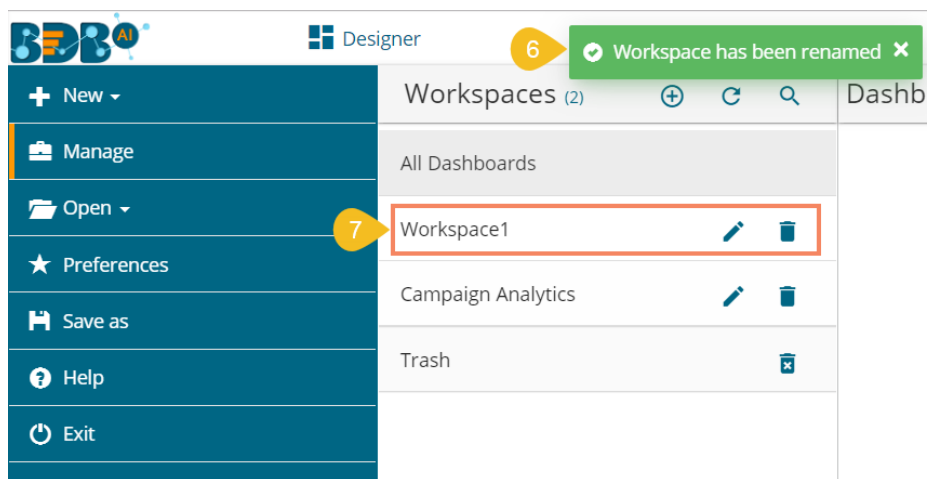
- i) Select a workspace from the **'Workspaces'** list.
- ii) Click the **'Rename'** icon.



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

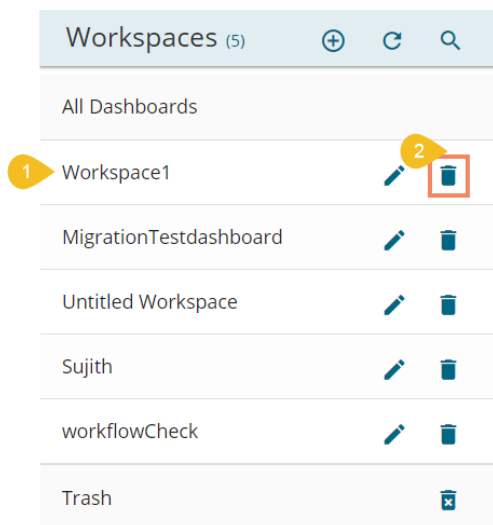


- vi) A message appears to assure the success of the renaming action.
- vii) The selected workspace gets saved with the new name.

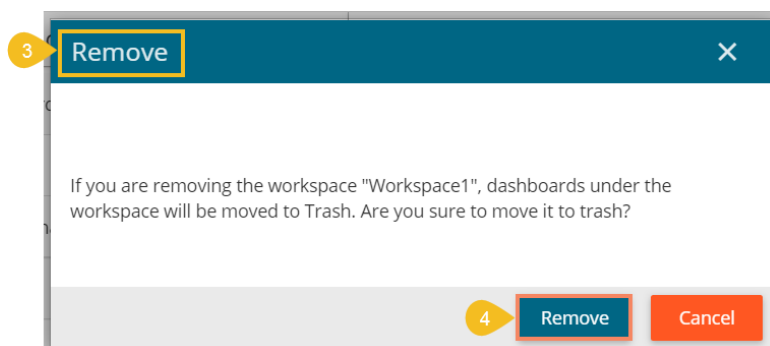


### 4.3. Deleting a Workspace

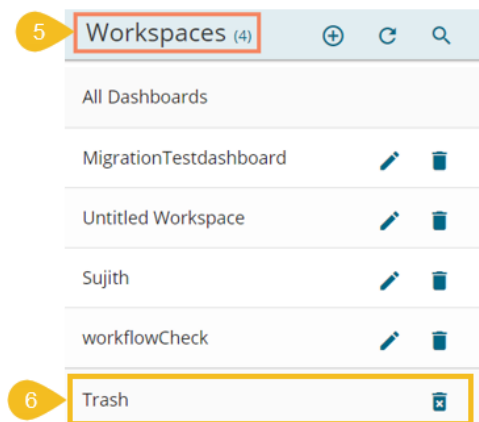
- i) Select a workspace from the 'Workspaces' list.
- ii) Click the 'Remove' icon.






- iii) A dialog window appears to confirm the deletion.
- iv) Click the 'Remove' option.

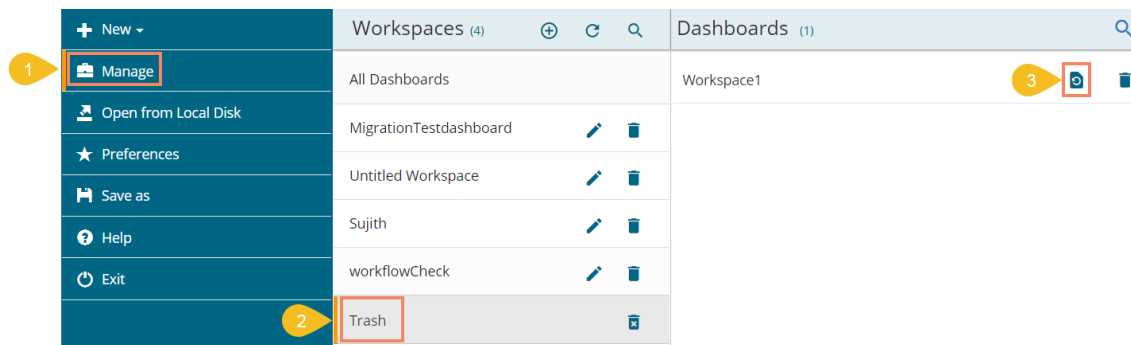



- v) The selected workspace gets removed from the list
- vi) The removed workspace gets added to the Trash Workspace.



Note:

- a. Removing a workspace causes default removal all the dashboards saved under it into the 'Trash' workspace.
- b. Click the 'Reload Workspaces' icon  provided next to the Workspaces list to load all the workspaces again.
- c. Click the 'Restore'  icon 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'  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.

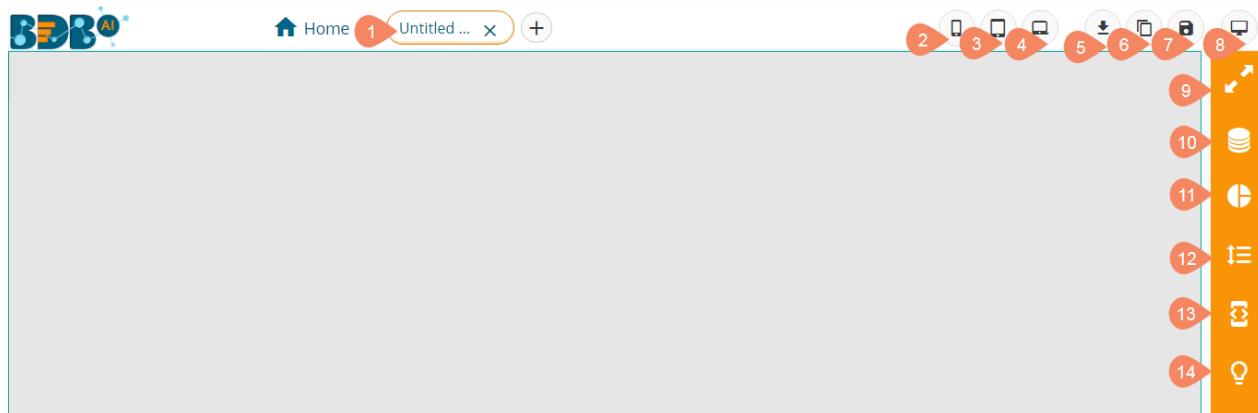
Click the 'New' drop-down icon on the homepage and select the 'Dashboard' option to access the Designer space/Canvas.

A wide range of charting components, filters, and Grid components 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 or the same workspace.
7. **Save (Dashboard)** : Saves the created dashboards in a workspace.

8. **Preview** : Displays the preview mode of the dashboard.
9. **Full Screen** : Maximizes the dashboard for a better view.
10. **Data Connectors** : 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** : Option used to define component scripts.
14. **Guided Tour** : Begins the guided tour for the Designer canvas.



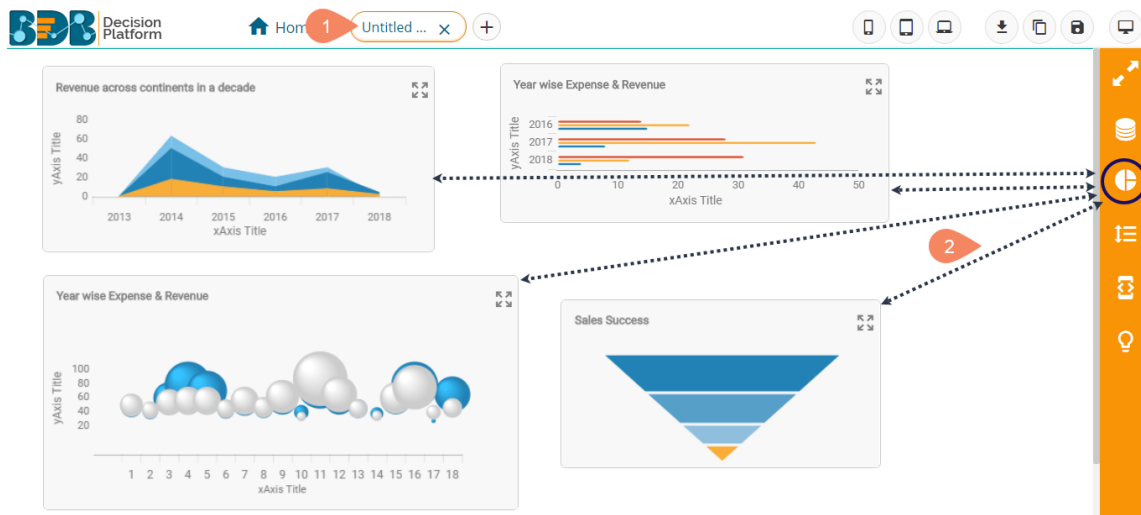
Note:

- a. Users will be redirected to the Designer homepage by clicking the **'Home'** option.
- b. Use the **'Save As'** option to save a dashboard in the same workspace with a different name. The user can save the dashboard in a different workspace.

## 5.1. Component Group

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

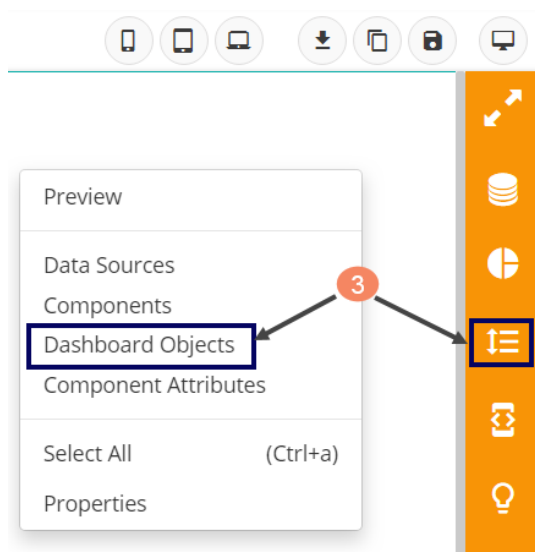
- i) Navigate to the Designer Canvas.
- ii) Select and drag multiple components to the canvas using the **'Component Library'** icon.



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

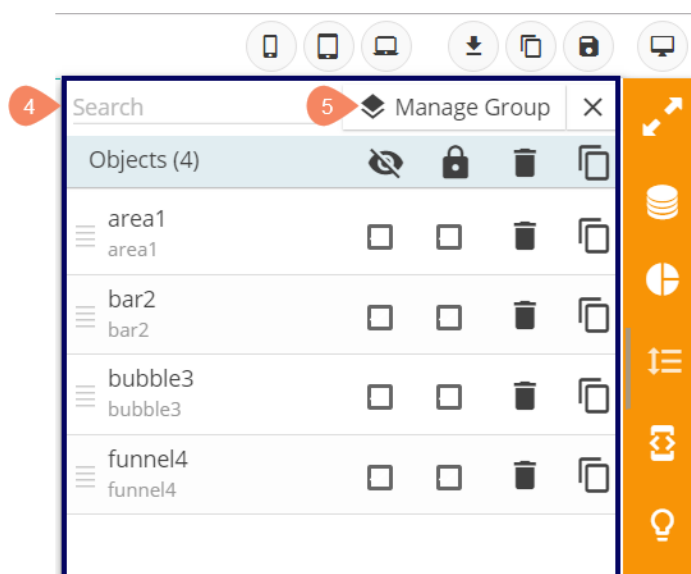
or

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



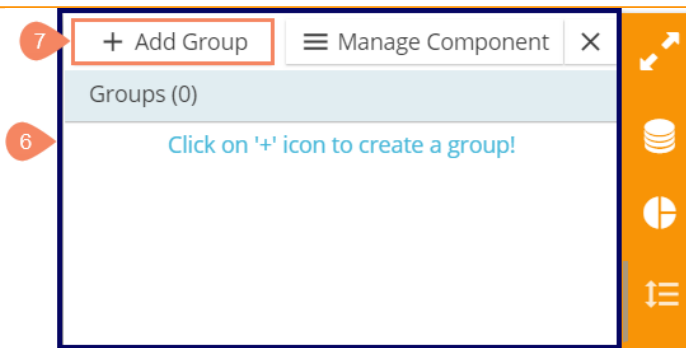
iv) A new panel opens with the dragged components names.

v) Select the **'Manage Group'**  icon from the panel.

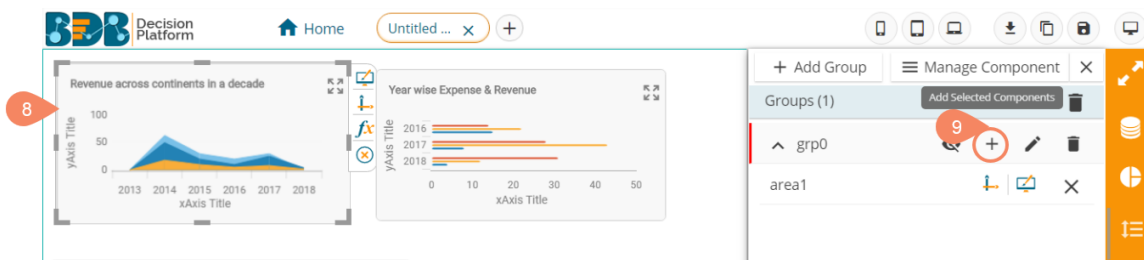


vi) A new window will pop-up to add the group.

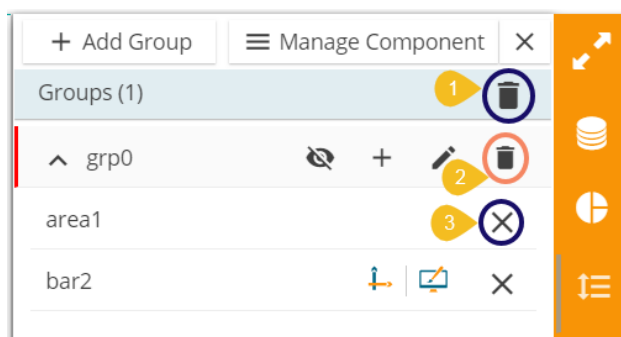
vii) Click the **'Add Group'** option to add a new group.



- 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.



- x) Deleting Group or Component: There are 3 options provided to delete either Group or component.
  - a. Click the **'Remove All'** icon (marked as number 1) to delete all the created/added groups.
  - b. Click the **'Delete Group'** icon (marked as number 2) provided next to the group name to delete the group.
  - c. Click the **'Delete from Group'** icon (marked as number 3) provided next to the component to remove the component from the group.

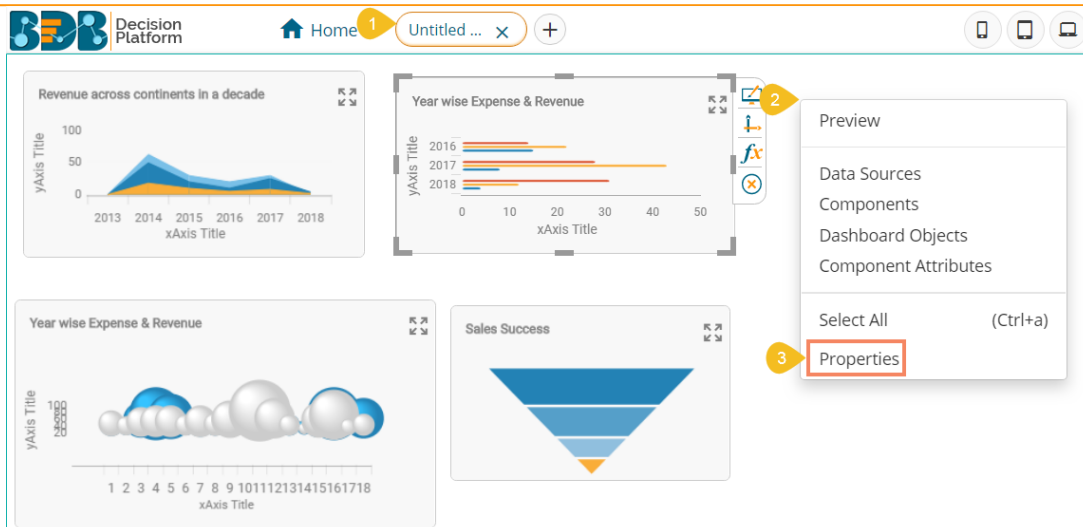


## 5.2. Canvas Properties

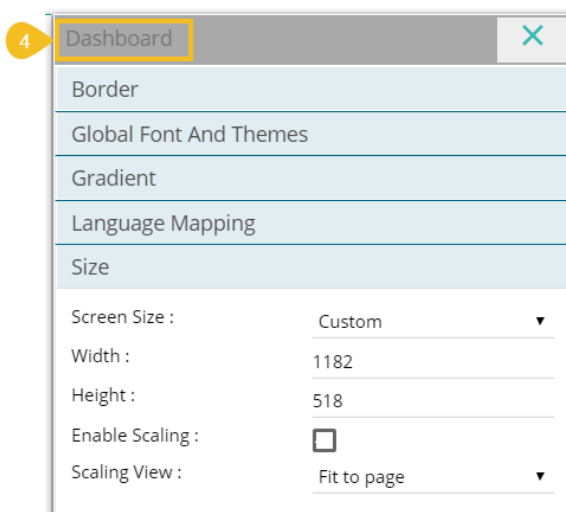
The Designer canvass is provided with specific properties.

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

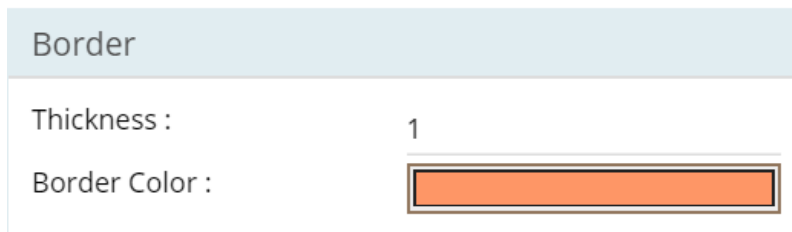




iv) The following Canvas properties will be displayed:



**a. Border**




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 :

Use Global Font :


Font Family :

Designer themes :

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 : 

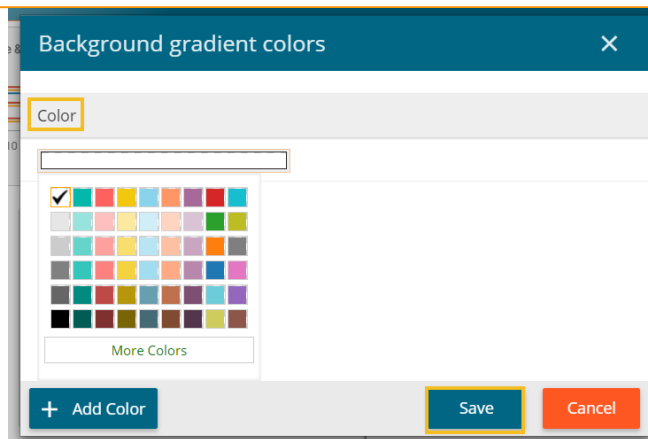
Opacity :

Background Rotation :

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


**Note:** By clicking the 'Background Colors' icon, a new window opens with a menu to select a 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.



#### d. Language Mapping

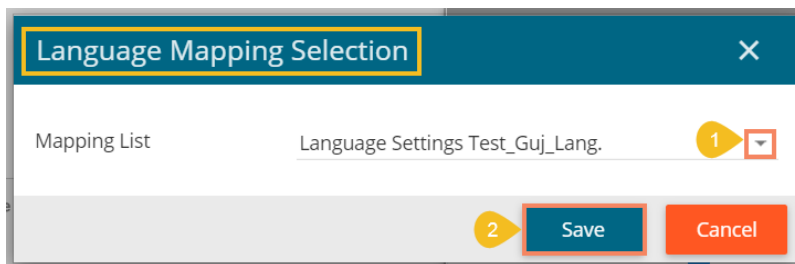
##### Language Mapping

- Enable :
- Hide Curly Braces :
- Select a Mapping: 

Parameter Name	Description
Enable	Enable this option to apply language mapping functionality.
Hide Curly Braces	Enable this option to hide the curly braces.
Select a Mapping	Select a language mapping using the drop-down menu.

**Note:** By clicking on the ‘Select a Mapping’ icon, the ‘Language Mapping Selection’ dialog box opens.

1. Select a language mapping option using the Mapping List drop-down menu.
2. Click the ‘Save’ option.



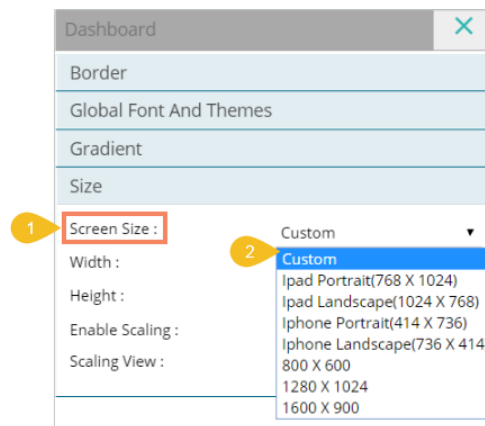
#### e. Size

Size	
Screen Size :	Custom ▼
Width :	1052
Height :	472
Enable Scaling :	<input type="checkbox"/>
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:** The Dashboard screen size can be scaled based on display devices (E.g., Mobile, iPad, and PC).

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

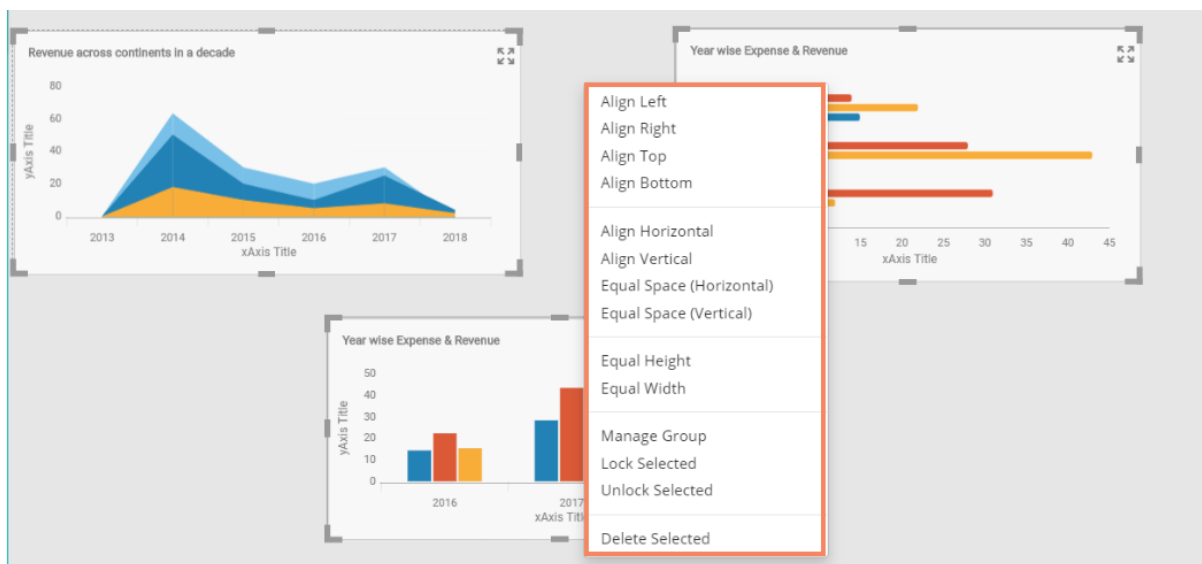


### 5.3. Context Menu Properties

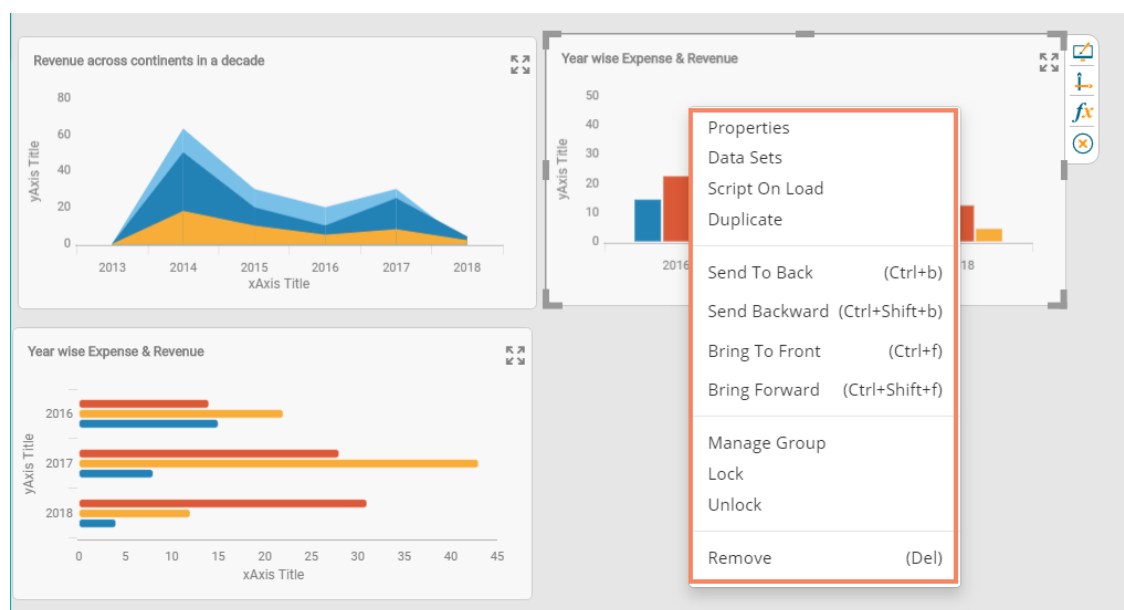
This section describes properties applied to multiple components when dragged into the designer canvas and selected.

Steps to Access the Context Menu Properties:

- Drag multiple components into the designer canvas (At least three components to avail all the properties).
- Select multiple components from the canvas. (At least three)
- Use right-click to open the context menu.
- The following properties will be listed in the context menu:
  - Align Left: All the selected components get aligned to the left.
  - Align Right: All the selected components get aligned to the right.
  - Align Top: All the selected components get aligned to the top.
  - Align Bottom: All the selected components get aligned to the bottom.
  - Align Horizontal: All the selected components get aligned horizontally.
  - Align Vertical: All the selected components get aligned vertically.
  - Equal Space (Horizontal): All the selected components get equal space horizontally.
  - Equal Space (Vertical): All the selected components get equal space vertically.
  - Equal Height: All the selected components get an equal height.
  - Equal Width: All the selected components get an equal width.
  - Manage Group: The user gets redirected to manage the group.
  - Lock Selected: All the selected components get locked.
  - Unlock Selected: All the selected components get unlocked.
  - Delete Selected: To delete the selected components.




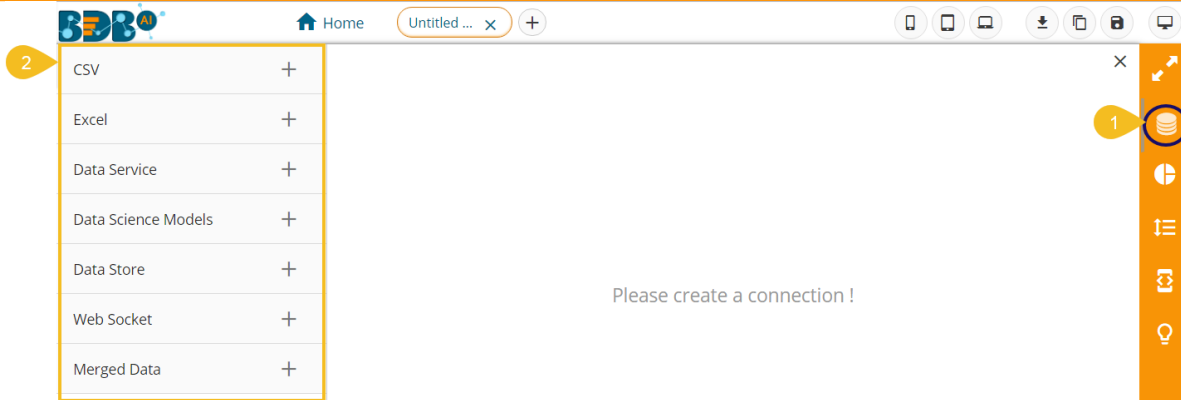
Note: Each dragged component is provided with a context menu containing a list of options as shown in the below image:



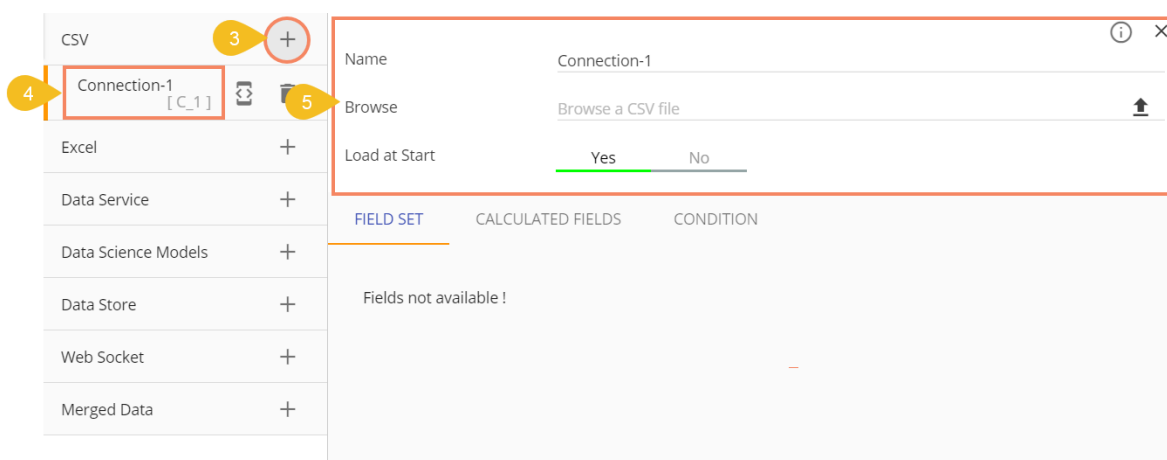
## 6. Connecting to a Data Source

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





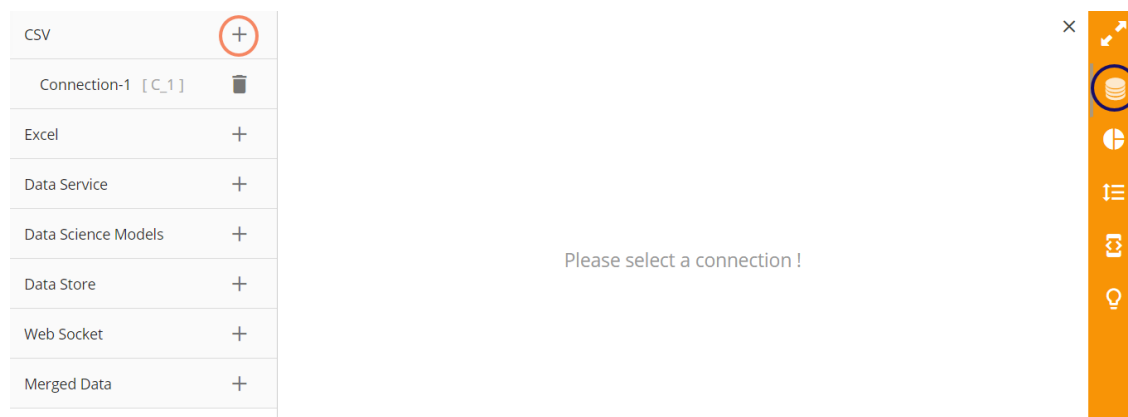
- iii) Select a data connection type and click the '**Create New Connection**' icon.
- iv) A new connection appears below.
- v) Configure the required details to create a data connection.



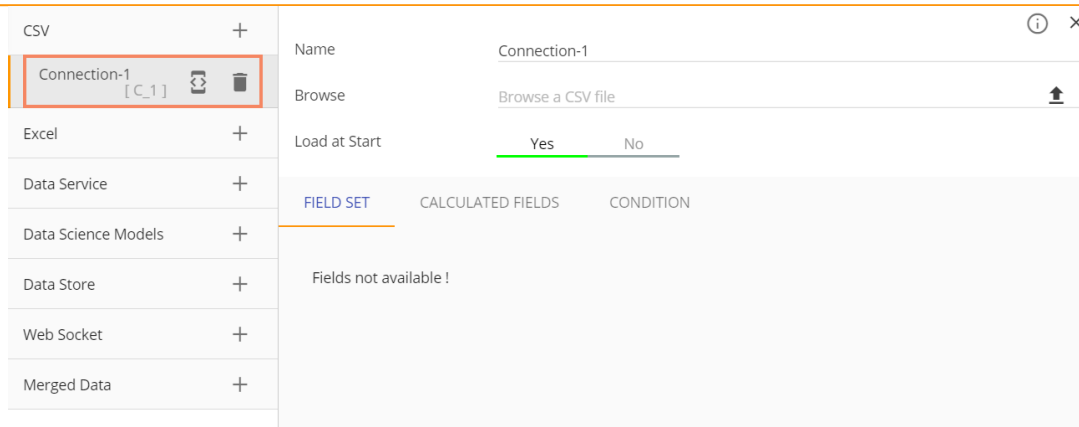
## 6.1. Connecting to a CSV File


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

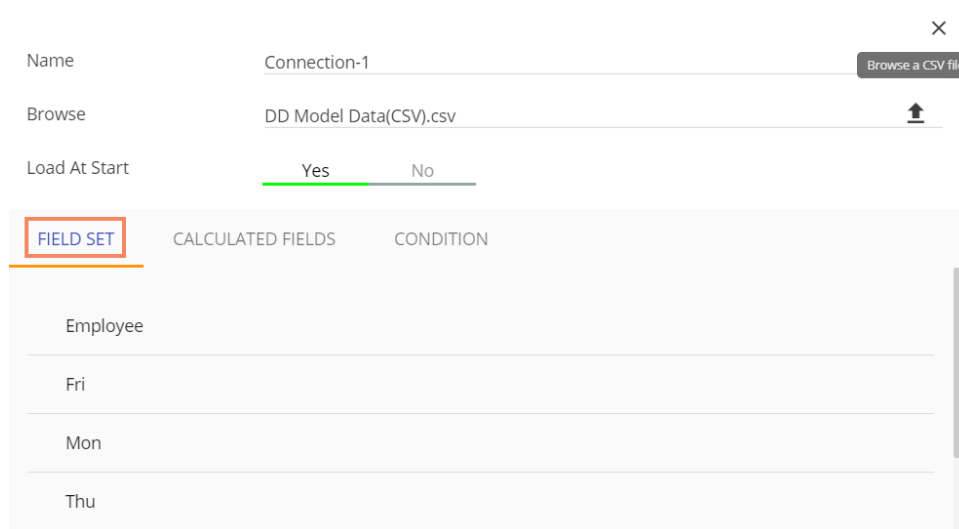
- i) Click the '**Data Connectors**' icon  to display all the available data connector types.
- ii) Click the '**Create New Connection**' icon  provided next to the '**CSV**' option.
- iii) A new connection gets added under the CSV connection type.



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



- v) Configure the following information:
  - a. **Name:** Name the connection.
  - b. **Browse:** Click the **'Browse'** icon  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 **'FIELDSET'** tab displays all the fields after establishing the data connection.



### 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.

Fields	Conditions	Actions
name		<input type="checkbox"/>
offered_ctc		<input type="checkbox"/>
previous_ctc		<input type="checkbox"/>
previous_organisation		<input type="checkbox"/>
referral_of		<input type="checkbox"/>
skills		<input type="checkbox"/>
source		<input type="checkbox"/>
team	BU 6	<input checked="" type="checkbox"/>
usd_billing		<input type="checkbox"/>

### 6.1.2. Calculated Field

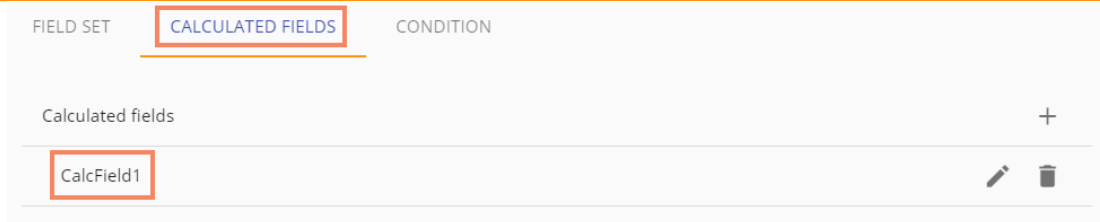
The users can add a calculated field by using this tab.

- 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 FIELDS**' tab
- v) The Calculated Field Editor dialog box opens:
  - a. Name: Provide a name for the calculated field
  - b. Script Editor: Use the Script Editor space to insert the desired calculation formula using the rule given below.
    - i. Enclose field names in square brackets: `[total_sales]/[number_of_items]`
    - ii. Enclose global variable in curly braces: `{bar1.profit}*2+[profit_jan]`
  - c. Click the '**Create**' option to create the calculated field




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

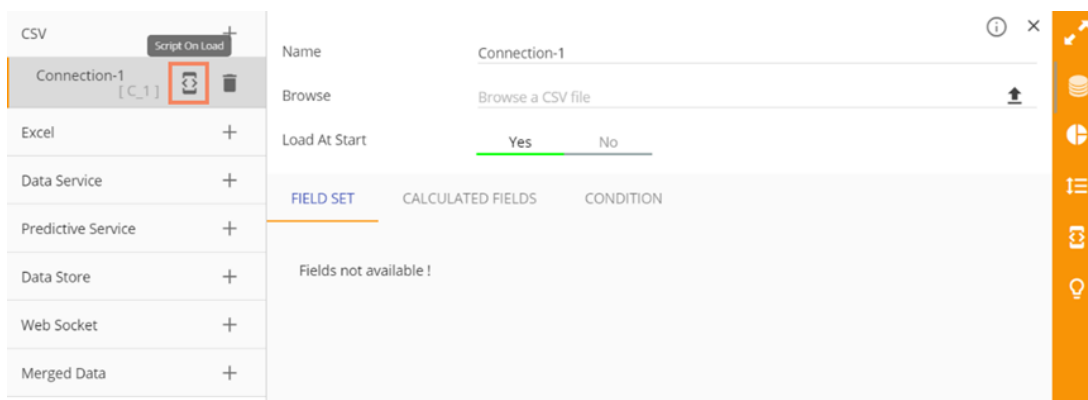




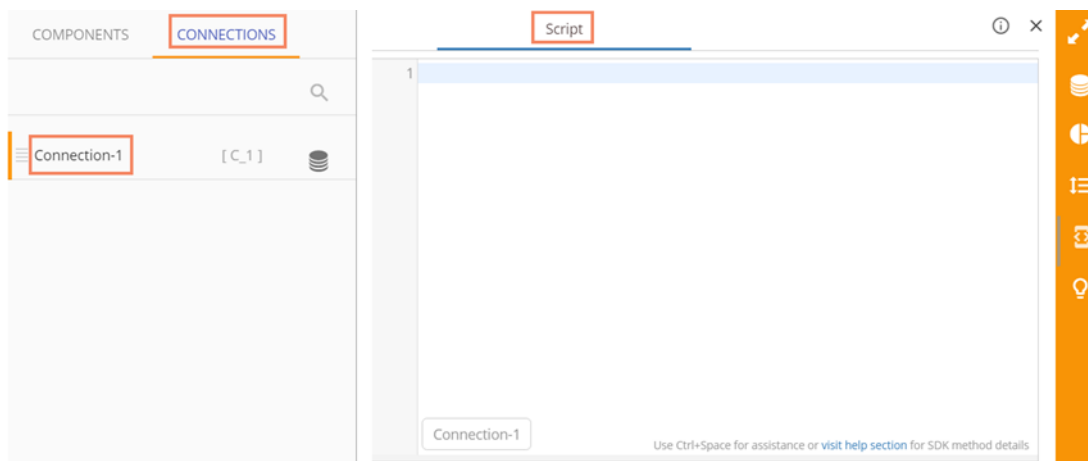
### 6.1.3. Script on Load for a Data Connection

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

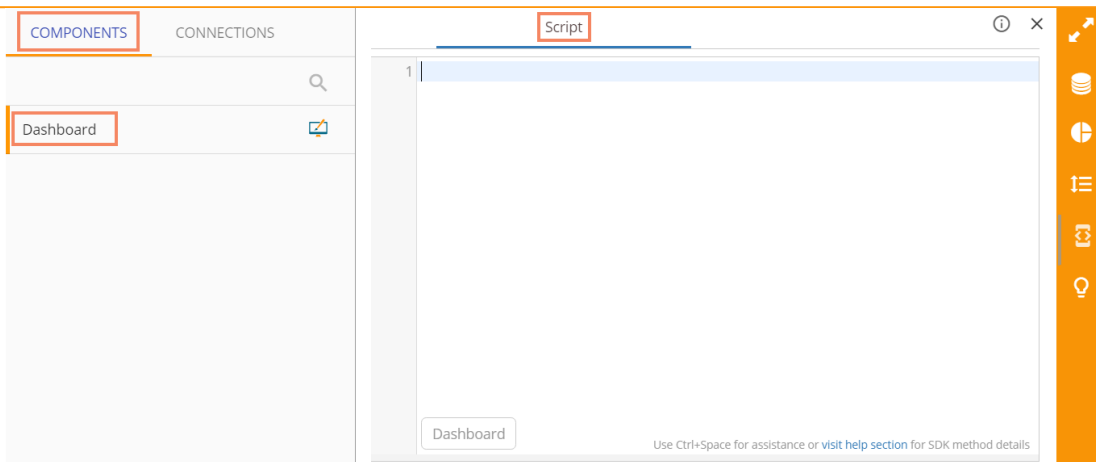
- i) Navigate to the Data Connectors page.
- ii) Select a Data Connector type.
- iii) Create a new Connection and configure it.
- iv) Select the 'Script on Load'  icon provided next to the connection.



- v) The Script tab appears to trigger a script to produce some action on the data connection.

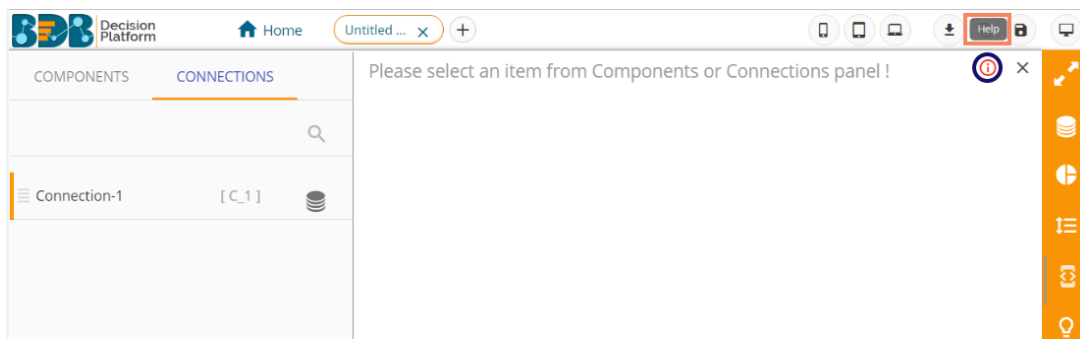


- vi) The user can also use a script for the Dashboard, which can be accessed via the 'COMPONENTS' tab.

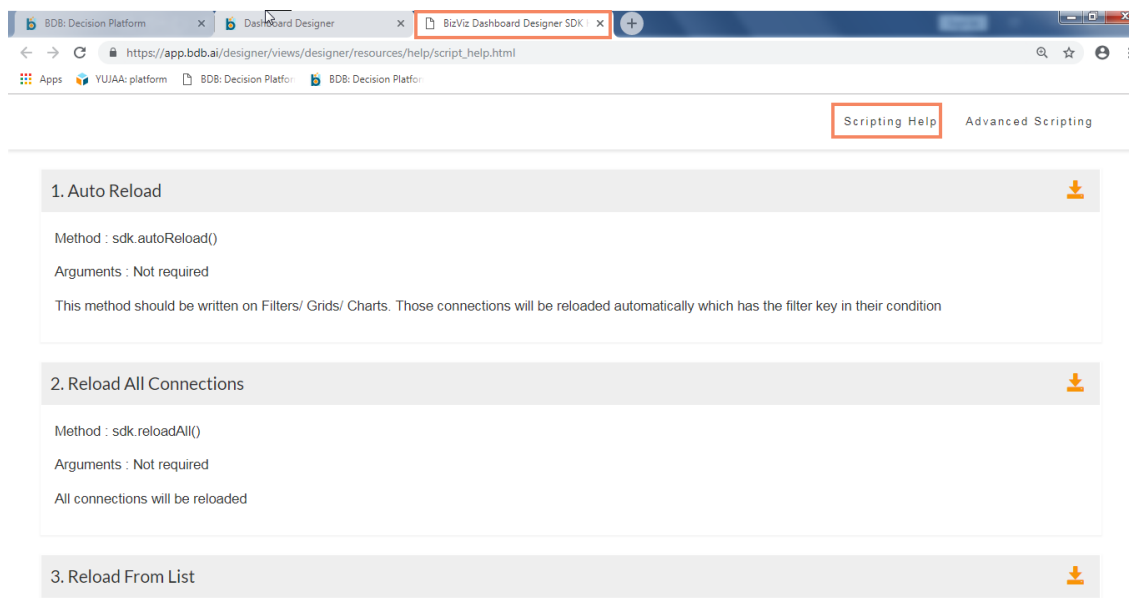


Note:

- a. Click the 'Help' icon from the Script on Load page.



- b. The Scripting Help tab opens with some predefined scripts.



- c. Click the 'Advanced Scripting' option to display the chart-wise advanced scripts.

Charts

Bar

Background

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

General

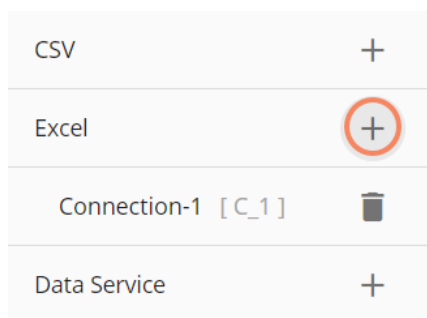
Bubble

Funnels

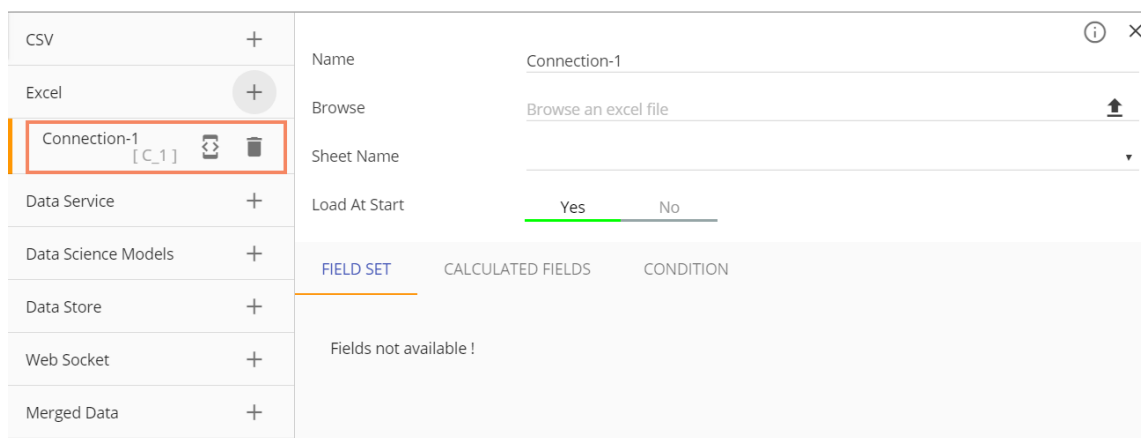
Map

## 6.2. Connecting to an Excel File


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

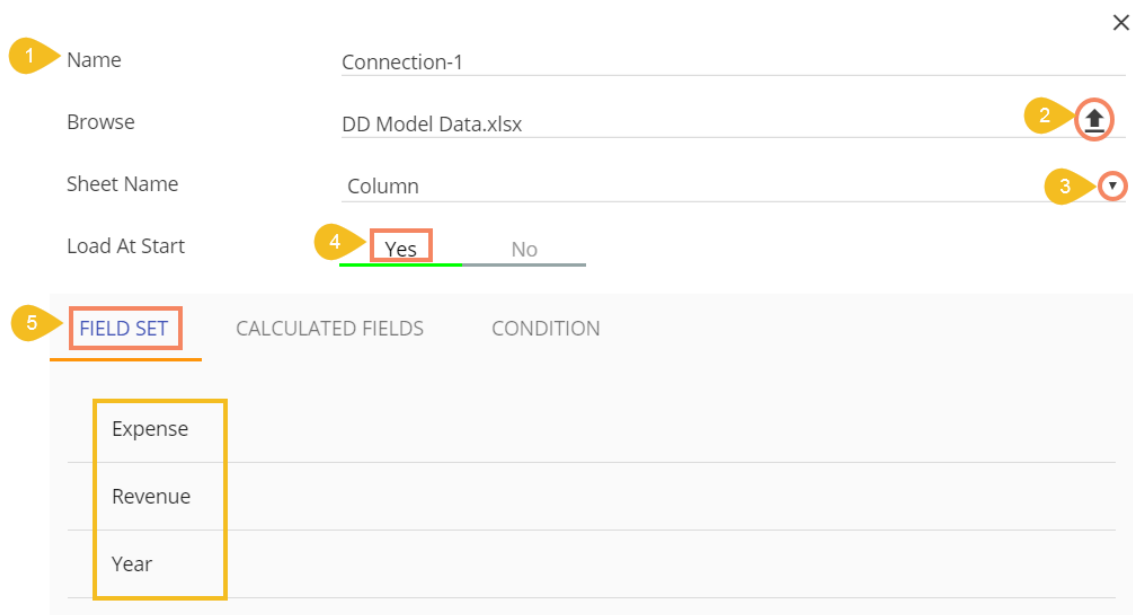


- iv) Click the Excel connection to display the connection-specific details.



- v) Configure the following information:
  - a. **Name:** Name the connection.

- b. **Browse:** Click the '**Browse**' icon  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 '**FIELDSET**' tab displays all the fields after establishing the data connection.





- 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		Conditions	Actions
Expense		<input type="text"/>	<input type="checkbox"/>
Revenue		<input type="text"/>	<input type="checkbox"/>
Year		2012	<input checked="" type="checkbox"/>

- 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

- 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 Service**' connector.
- iii) A new connection gets added under the Data Service connector type.

CSV	+
Excel	+
Data Service	+
Data Science Models	+

iv) Click the Data Service connection to display the connection-specific details.

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 appears when the 'Timely Refreshed' field has been enabled.)

vi) The 'FIELDSET' tab displays all the fields after establishing the data connection.

Note:

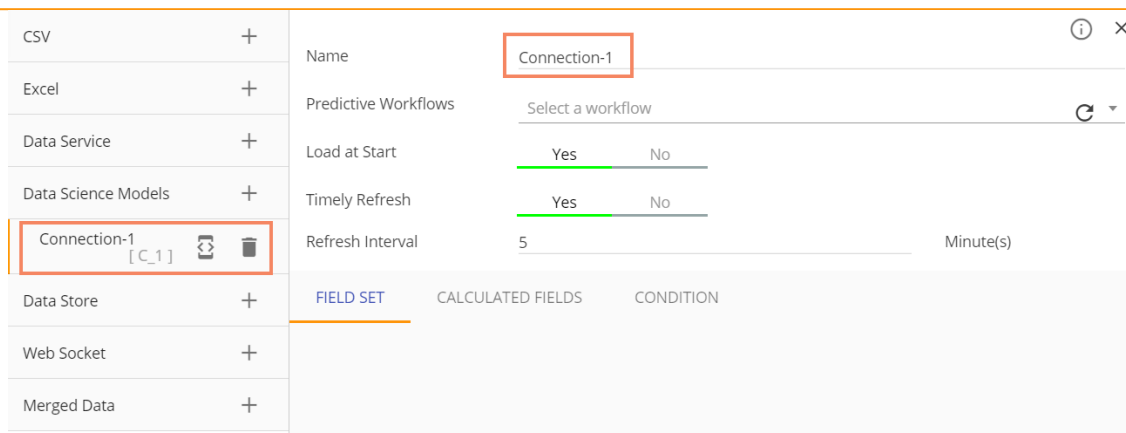
- a. The users can filter the targeted data set using the '**CONDITION**' option and trigger a script to produce some action on the connection part using the '**Script on Load**' icon.
- b. Click the '**Reload Data Sources**' icon to reload the existing data connectors.
- c. Click the '**Refresh Service**'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

## 6.4. Connecting to a Data Science Model

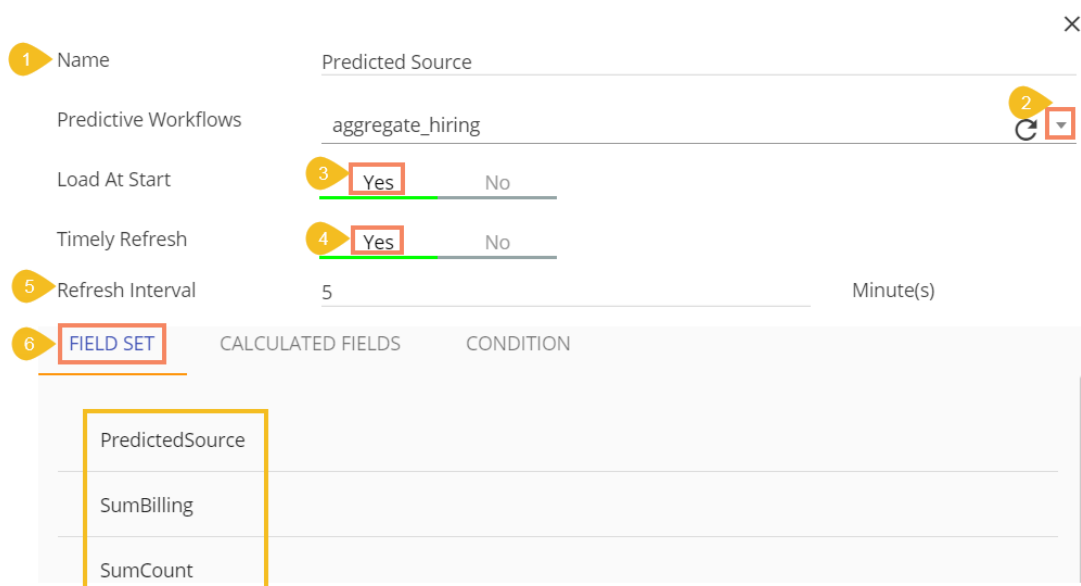
- i) Click the '**Data Connectors**' icon to display all the available data sources.
- ii) Click the '**Create New Connection**' icon provided next to the '**Data Science Model**' connector.
- iii) A new connection gets added under the Data Science Model connector type.

CSV	+
Excel	+
Data Service	+
Data Science Models	<span style="border: 2px solid red; border-radius: 50%; padding: 2px;">+</span>
Data Store	+

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



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



Note:

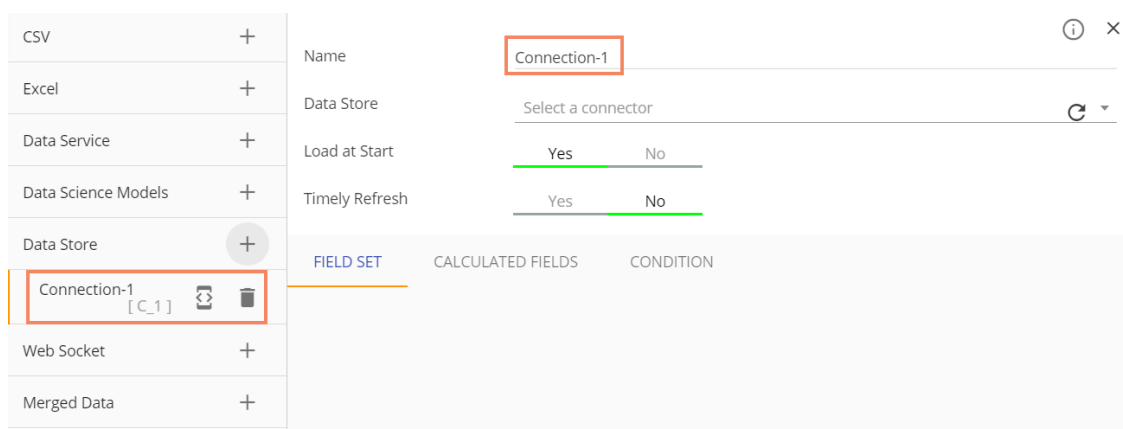
- The users can filter the targeted data set using the 'CONDITION' option and trigger a script to produce some action on the connection part using the 'Script on Load' icon.
- Click the 'Refresh Workflows' icon to refresh the deployed Predictive Workflows.

## 6.5. Connecting to a Data Store

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



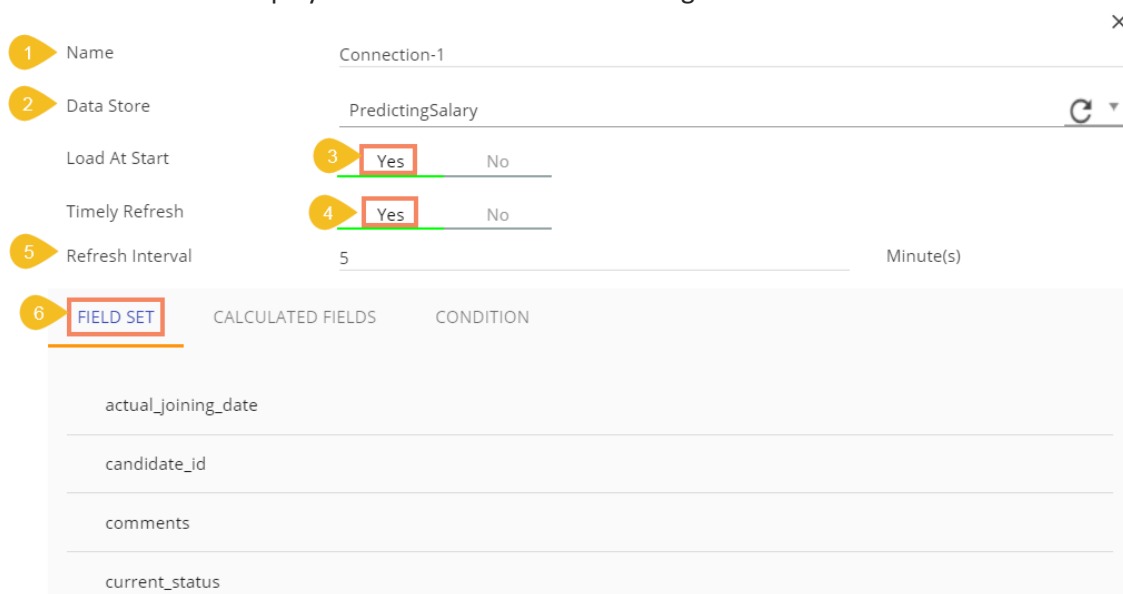
iv) Click the datastore connection to display the connection-specific details.



v) Configure the following information:

- a. **Name:** Provide a name for the connection.
- b. **Data Store:** Select a datastore 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 'FIELDSET' tab displays all the fields after establishing the data connection.



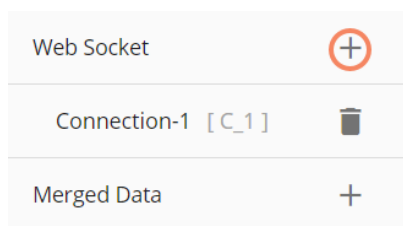
Note:



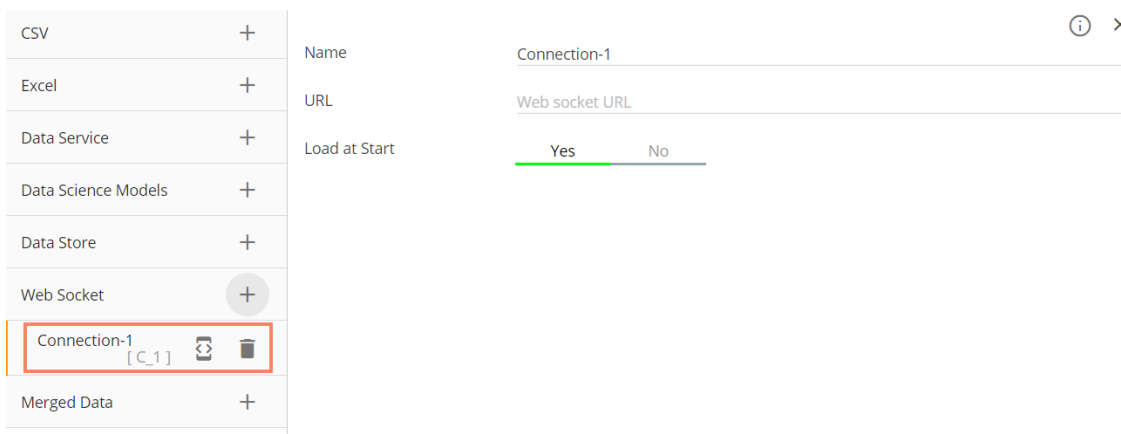
- a. The users can filter the targeted data set using the '**CONDITION**' option and trigger a script to produce some action on the connection part using the '**Script on Load**' icon.
- b. Click the '**Refresh Data Stores**' icon to refresh the available Data Stores.

## 6.6. Connecting to a Websocket

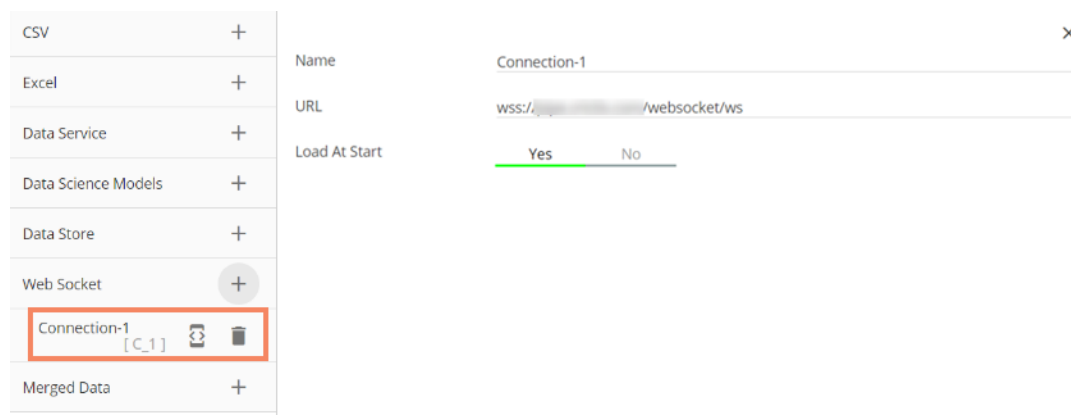
- i) Click the '**Data Connectors**' icon.
- ii) Click the '**Create New Connection**' icon provided next to the '**Websocket**' connector.
- iii) A new connection gets added under the Data Store connector type.



- iv) Click the Web Socket connection to display the connection-specific details.



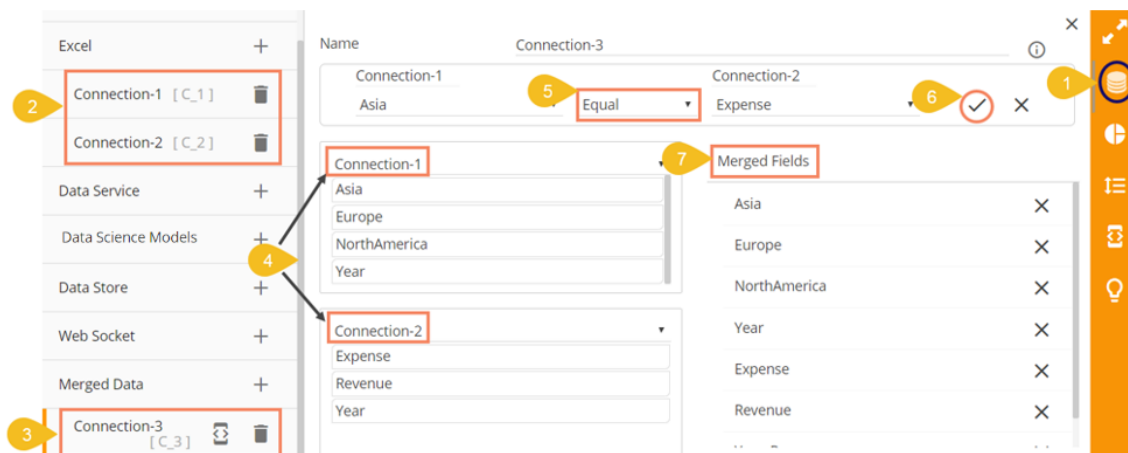
- v) Configure the following information:
  - a. **Name:** Provide a name for the connection
  - b. **URL:** Enter a URL link
  - c. **Load at Start:** Enable this option to get up-to-date data / pull the updated data from the data source before loading into charts.



vi) The websocket connection gets established.

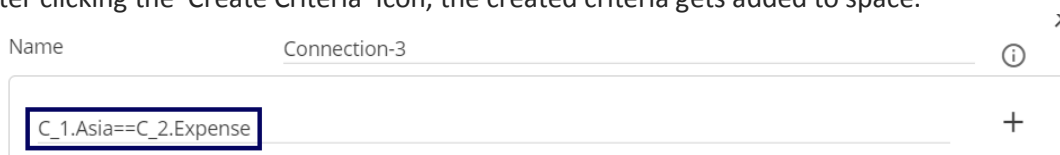
## 6.7. Connecting to a Merged Data

- 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.



Note:

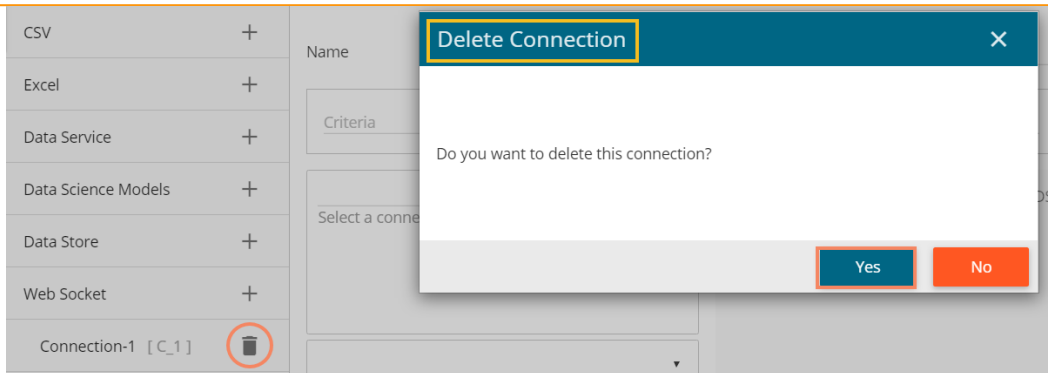
- a. Users can remove the fields added to the merged data connection using the 'Remove' icon.
- b. After clicking the 'Create Criteria' icon, the created criteria gets added to space.



## 6.8. Deleting a Data Connection


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

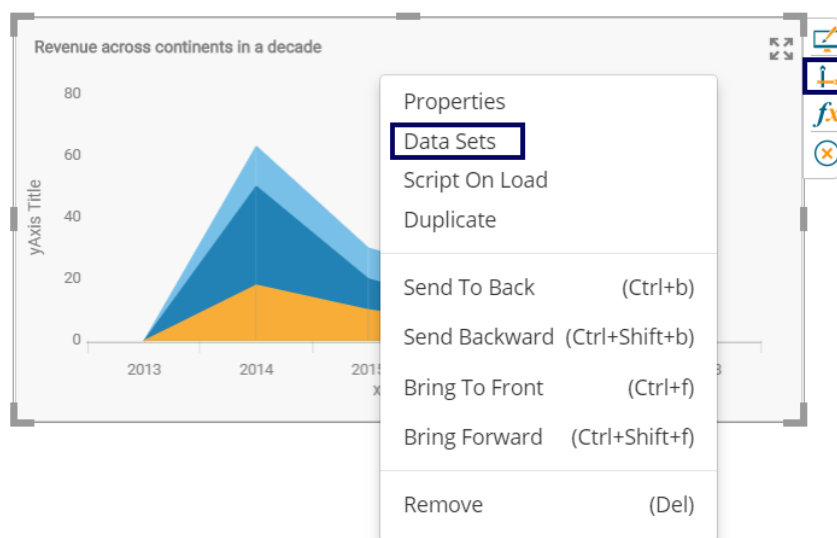
- i) Navigate to the Data Connector page.
- ii) Select a data connection.
- iii) Click the 'Delete' icon.
- iv) A dialog box appears to assure the action.
- v) Click the 'Yes' option to delete the connection.



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

## 6.9. 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  
Use right click on the dashboard component and click the 'Data Sets' option.



iv) The user gets directed to the **Dataset Palette**.

### 6.9.1. 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.

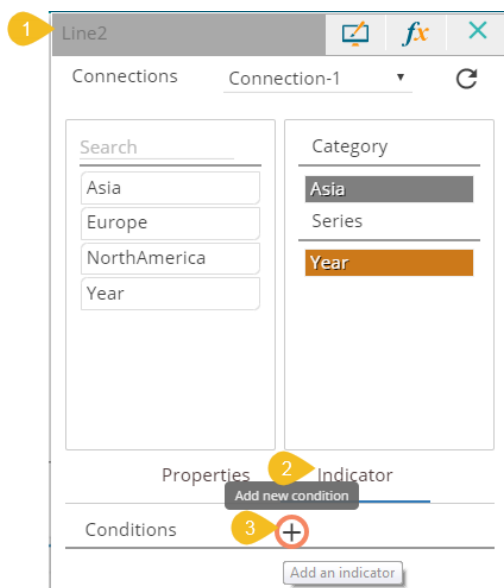
- a. Map a data connection using the drop-down menu. (Ref. '**Connecting to a Data Source**' section)
- b. Drag and drop the required fields as described below:
  1. **Category**: it takes the fields selected as dimensions for the component.
  2. **Series**: it takes the fields selected as measures for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



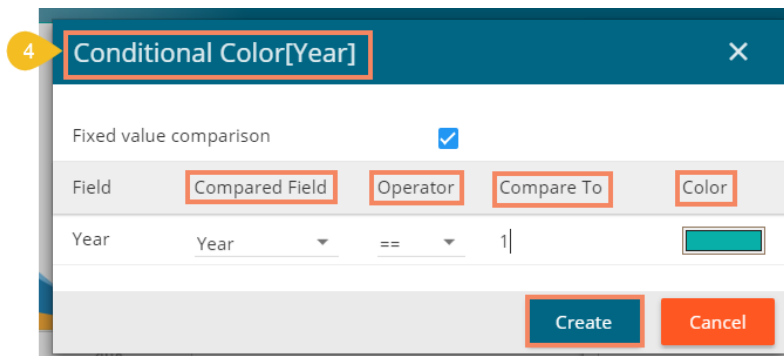
### 6.9.2. Indicator Tab

The Dataset Palette displays Indicators tab together with Properties for some components, E.g., Line, Grid. The users can add various data conditions by using the Indicator tab.

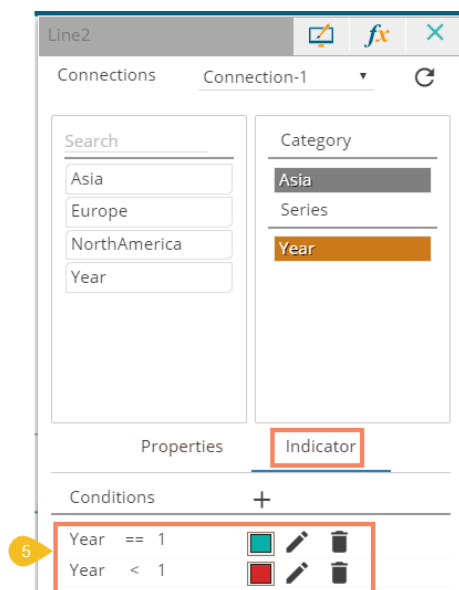
- i) Navigate to the Dataset Palette for the selected range of the charting components that contain Indicator tab.
- ii) Navigate to the Indicator tab.
- iii) Click the 'Add new Condition' icon.



- 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.





- v) The created Conditions gets added to the Indicator tab.



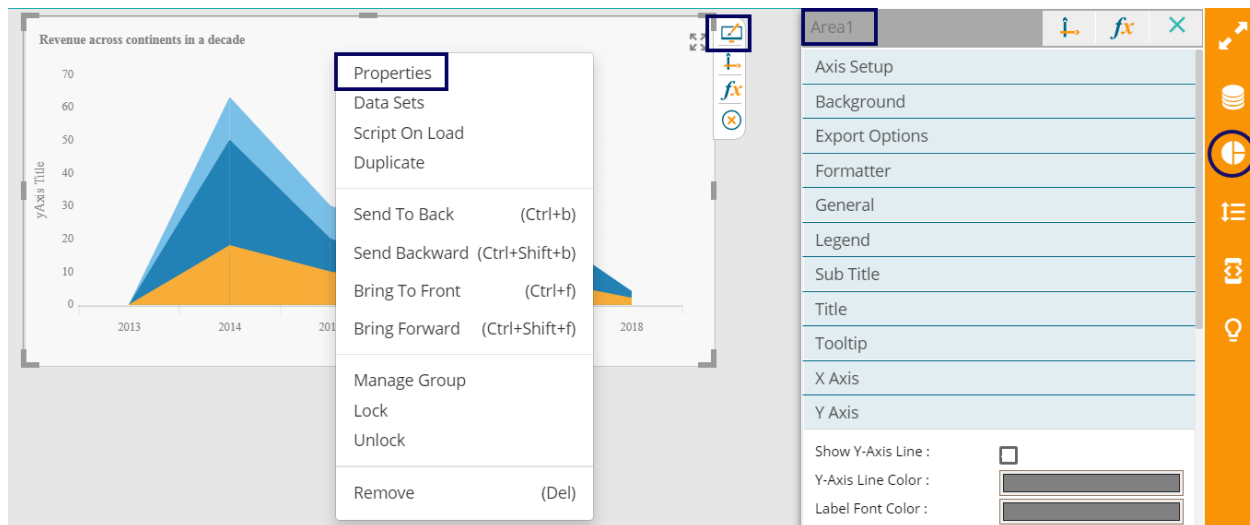
## 7. Components

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.

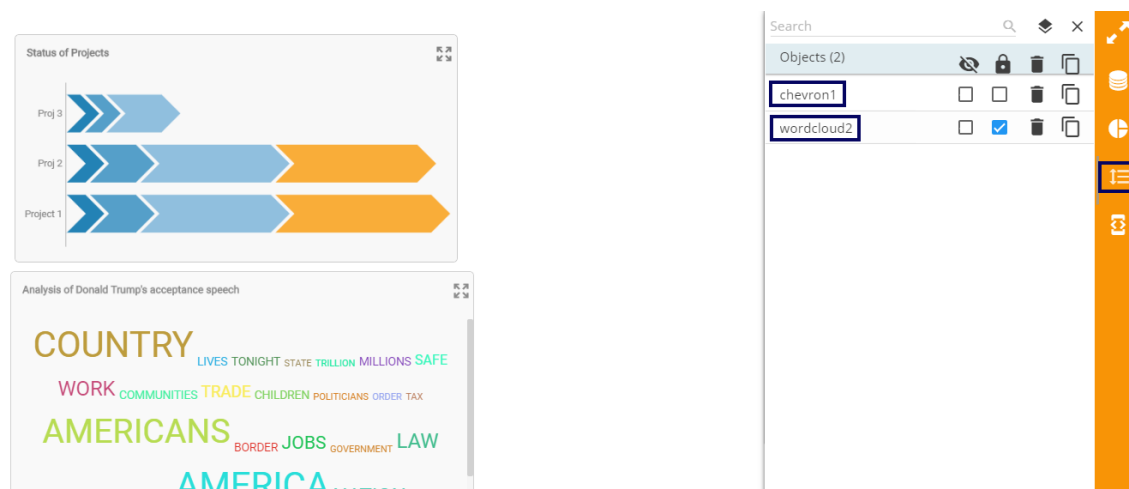
## 8. Dashboard Objects

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

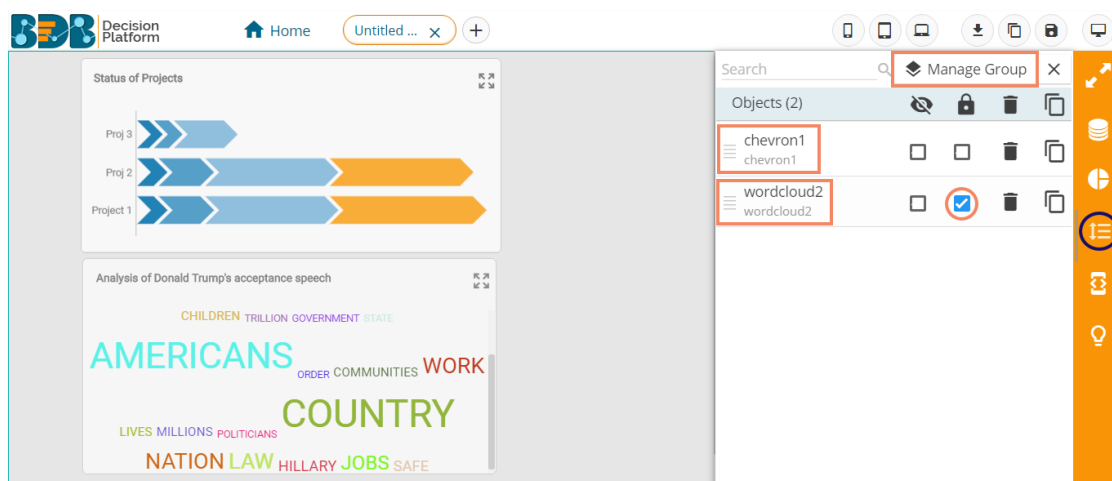
Every component which is dragged into the canvas gets its properties displayed in the Manage Component browser window. Click the 'Manage Dashboard Components' icon to display the browser window for the dragged Designer components.

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  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  provided 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 number of dragged charting components increase in a dashboard, it becomes difficult for users to find out the specific component. Use the '**Search**' bar 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:

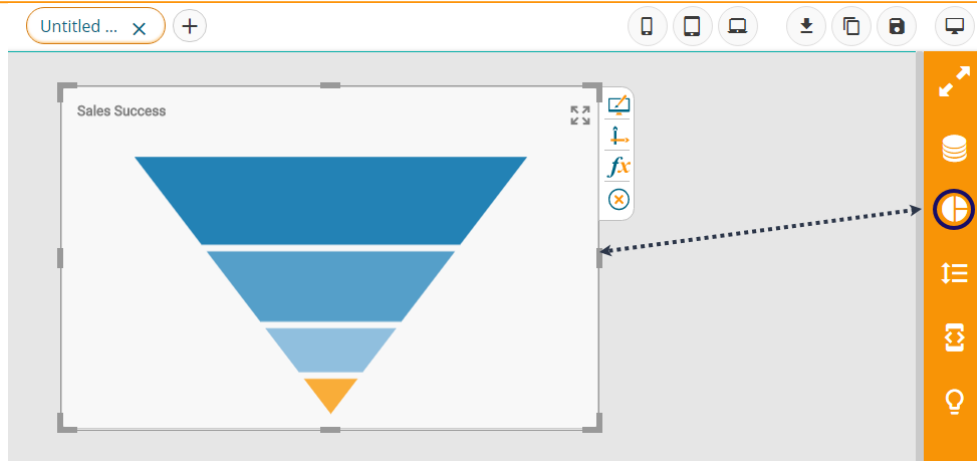
- a) Passing Default Values (Manual Filter)
- b) Performing Dynamic Filtering (through SDK methods)

### 9.1. Passing Default Values

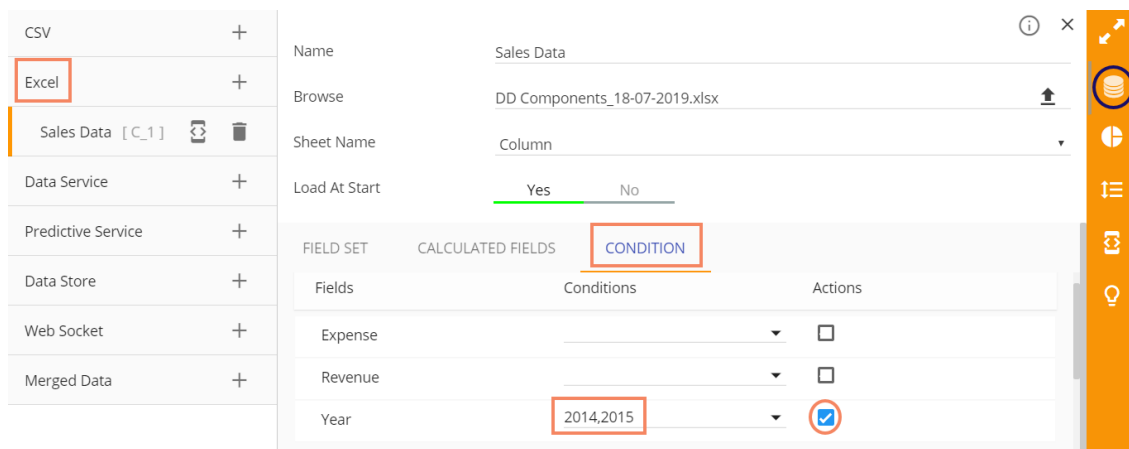
This section aims to explain how to pass default values in the charts.

**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)




- 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.





Fig-1

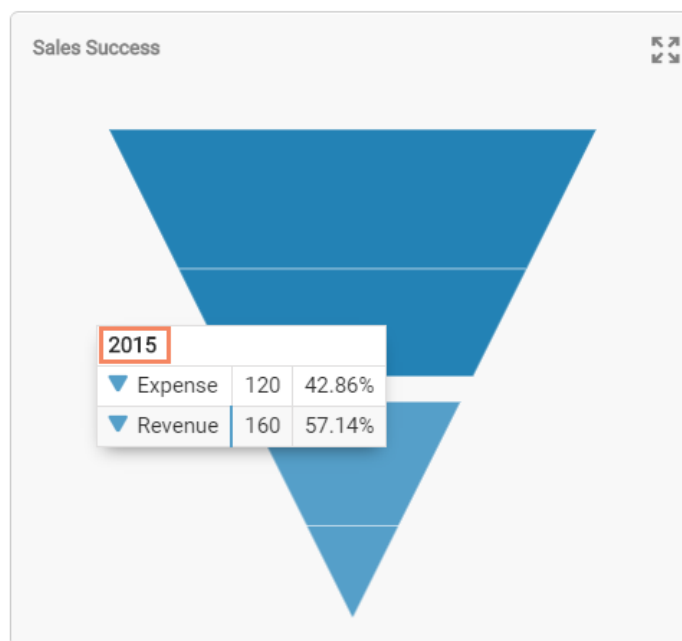


Fig-2

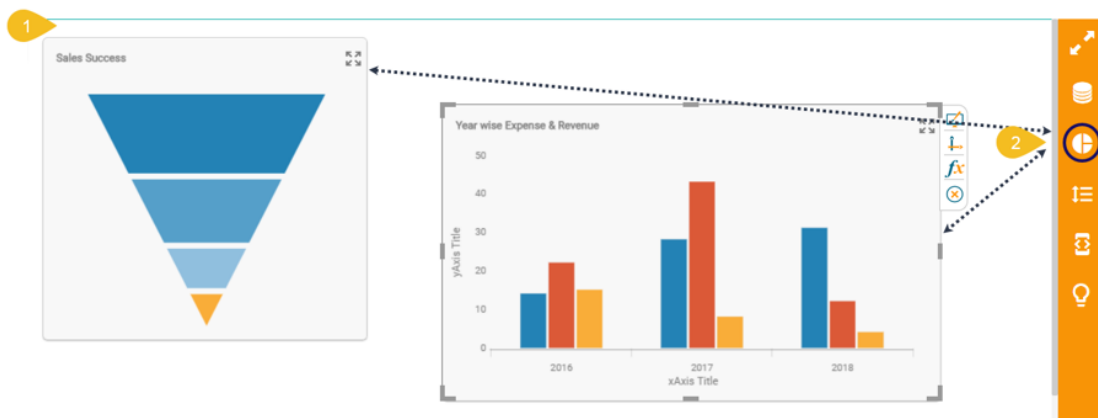
## 9.2. Performing Dynamic Filtering

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. The user can pass the values of one component into another component to achieve dynamic filtering functionality.

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

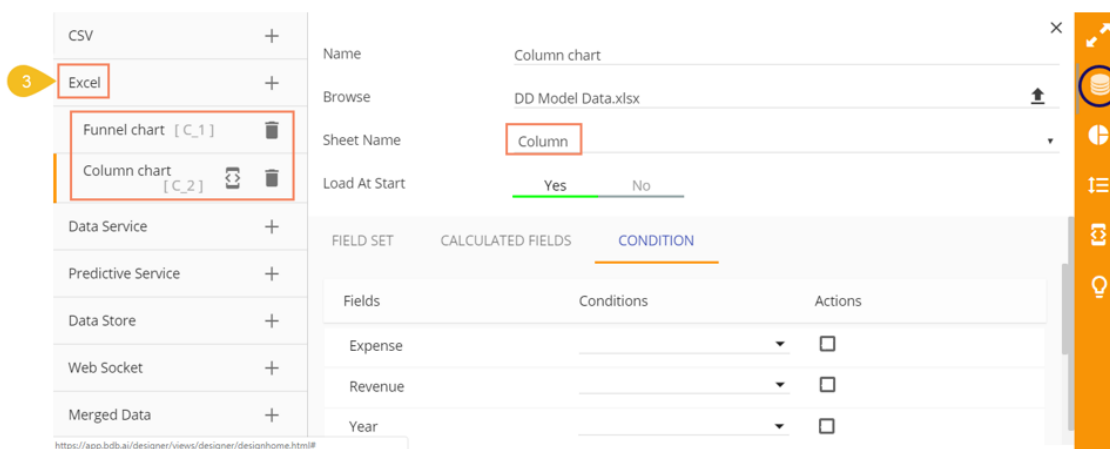
- i) Navigate to the Designer canvas.

- 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).

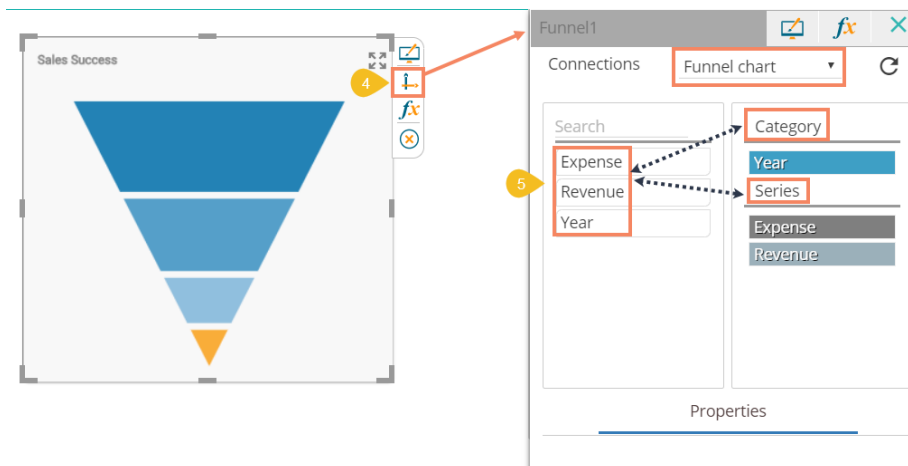


- iii) Connect an Excel data source of sales data. (Refer to section 7.2. for creating a data source connection using Excel File).

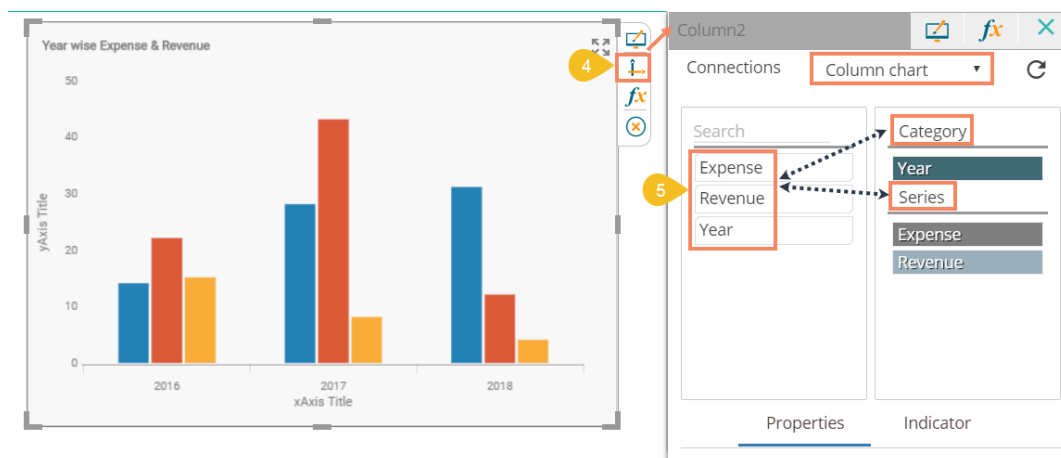
Note: Use a single data set for both the connections so that they contain the same data while using the data drill.



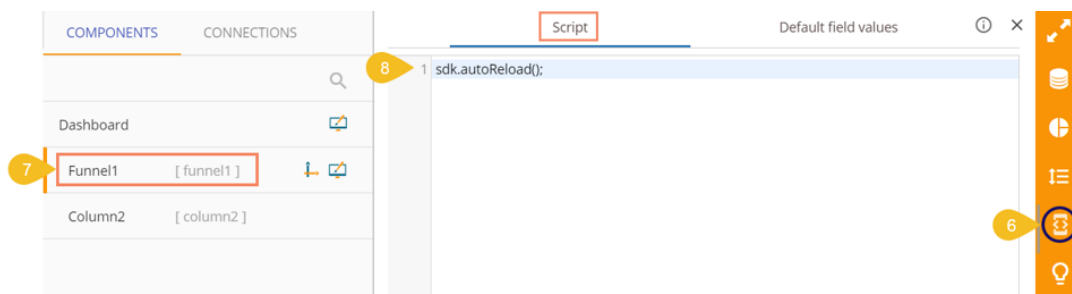
- iv) Connect the created data connectors to the respective charting components using the Data Set icon.
- v) Configure the required Dataset Palette fields, as shown below:
  - a. Do the required configurations for the Funnel chart-



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.



- 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

Browse DD Model Data.xlsx 9

Sheet Name Column

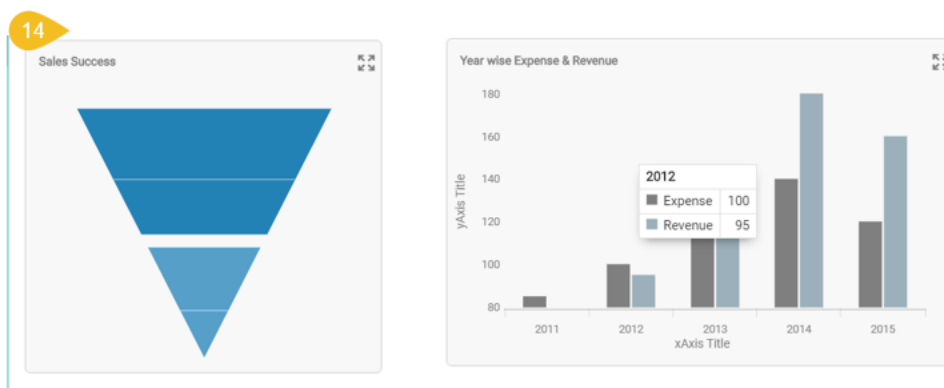
Load At Start Yes No

---

FIELD SET CALCULATED FIELDS 11 CONDITION

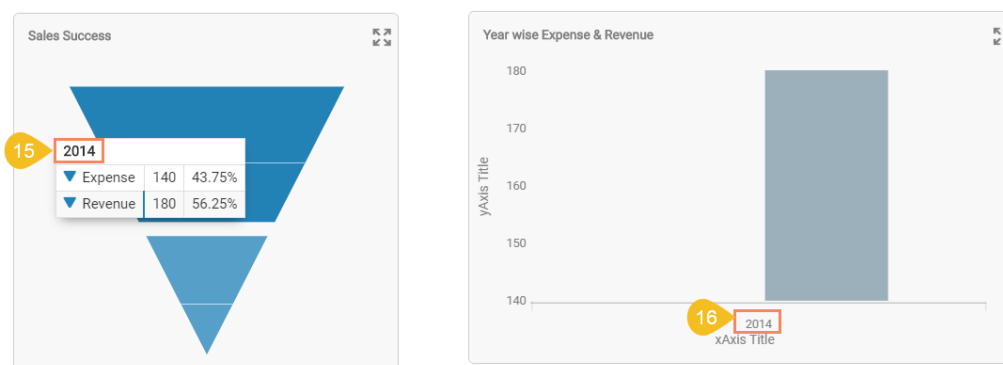
Fields	Conditions	Actions
Expense		<input type="checkbox"/>
Revenue		<input type="checkbox"/>
Year	<span style="border: 1px solid red; border-radius: 50%; padding: 2px;">12</span> {funnel1.Year}	<span style="border: 1px solid red; border-radius: 50%; padding: 2px;">13</span> <input checked="" type="checkbox"/>

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 for the selected year displays via the Column chart.



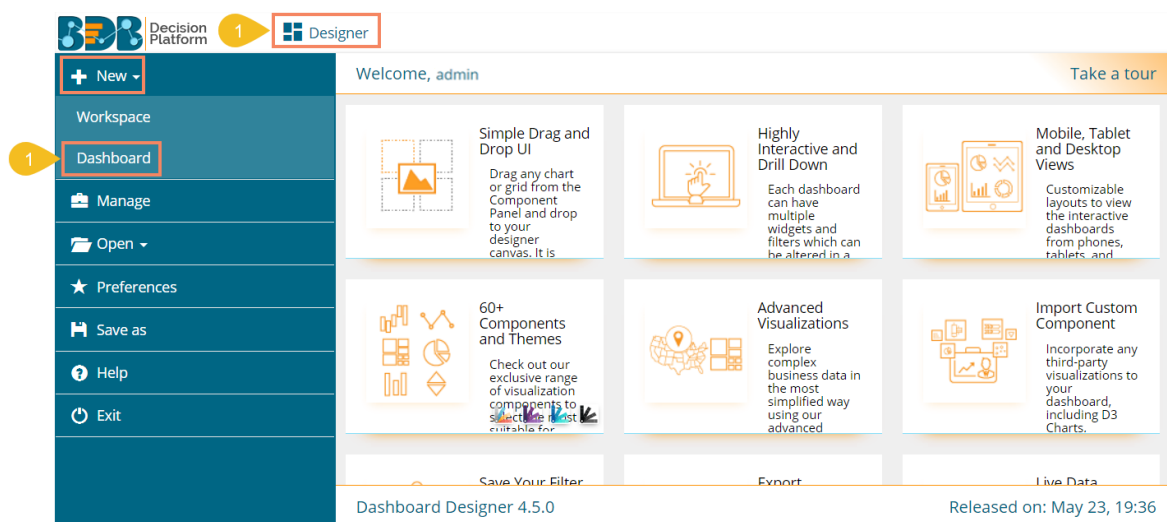
## 10. Scripting Window

BDB offers a scripting mechanism in the Designer plugin to help the users experience the 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.

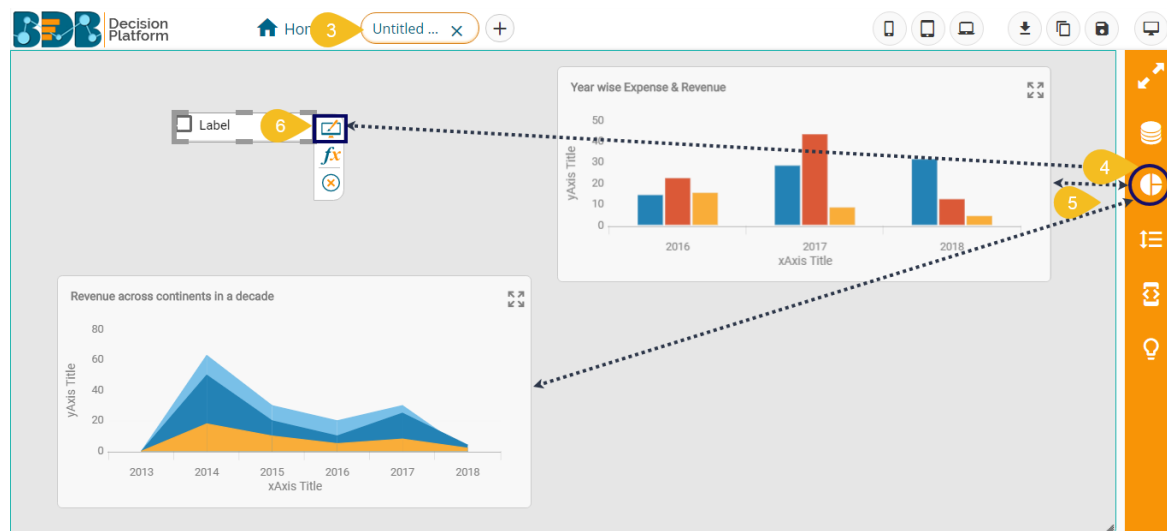
This section aims to provide a basic understanding of writing scripts and functionality.

**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**.

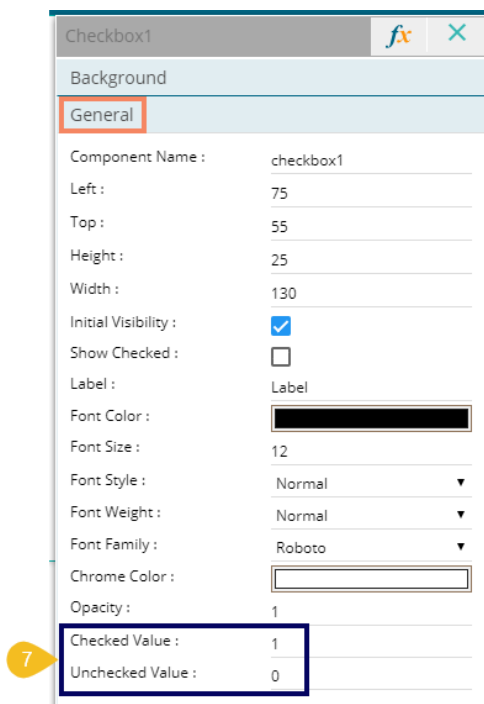
- i) Navigate to the Designer homepage.
- ii) Select the '**Dashboard**' option using the '**New**' drop-down menu to create a new dashboard.  
OR  
Click the '**Designer**' option given on the header of the homepage.



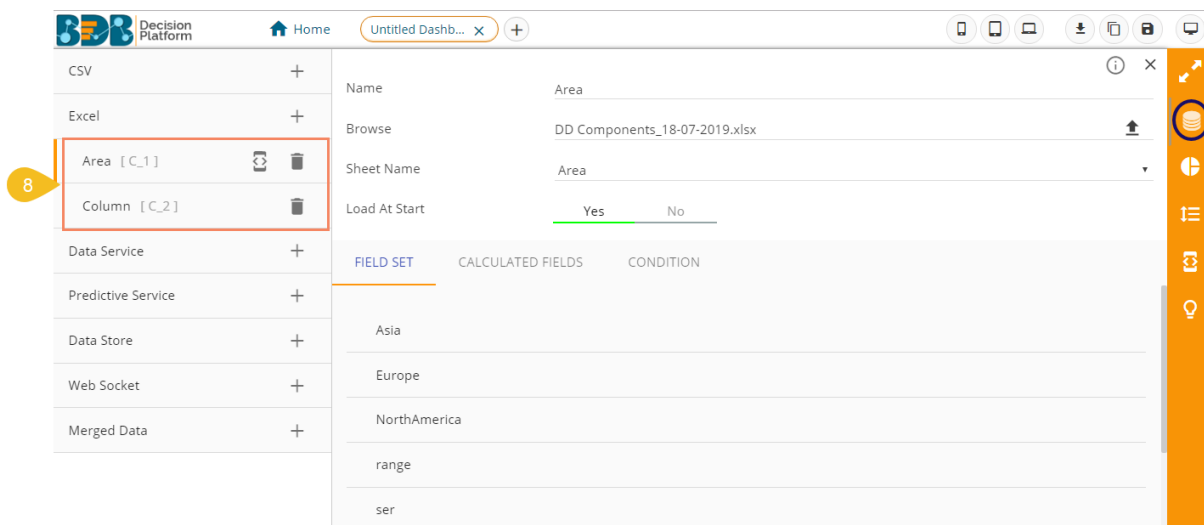
- iii) The dashboard canvass opens for the Untitled Dashboard.
- iv) Click the '**Component Library**' icon.
- v) Drag and drop the '**Checkbox**,' '**Column Chart**,' and '**Area Chart**' components into the canvas.
- vi) Click on the '**Properties**' icon next to the Checkbox component.



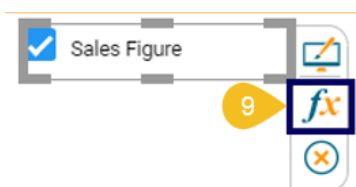
- vii) Set **Checked Value to '1'** and **Unchecked Value to '0'** (as shown below) using **'General'** properties tab of the Checkbox component.



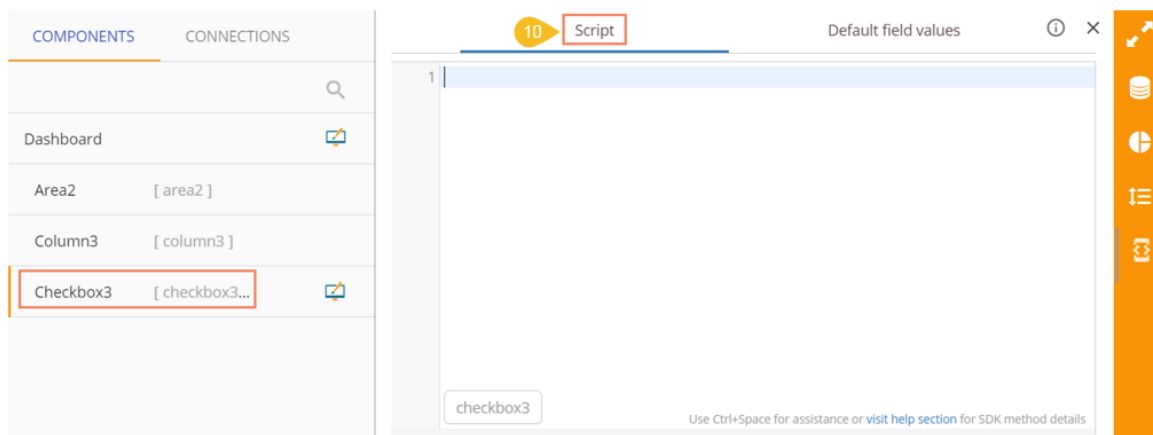
- viii) Create data connections for the Column chart and Area chart. (Ref. **Connecting Data Set Connection to a Dashboard Component**).



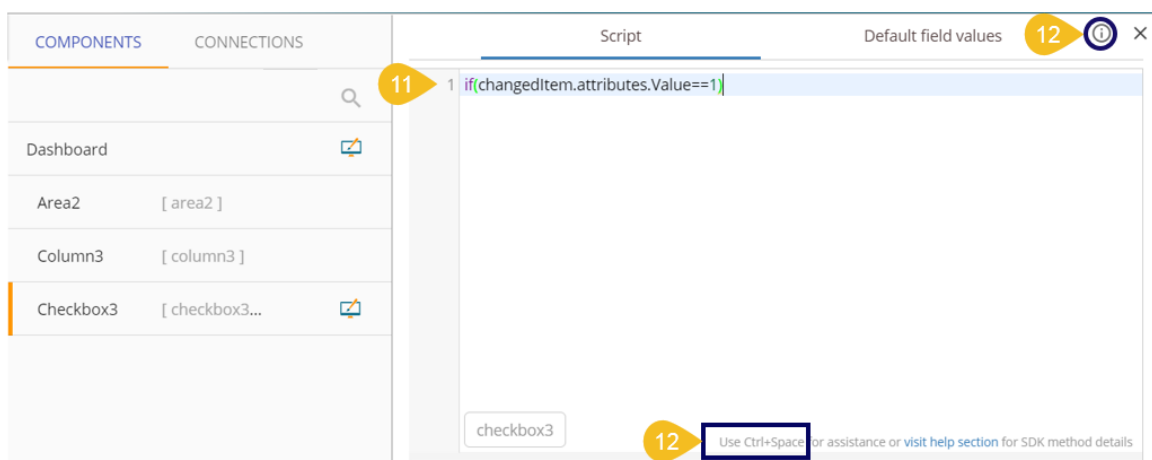
- ix) Click on the **'Script on Load'** icon provided next to the Checkbox component.



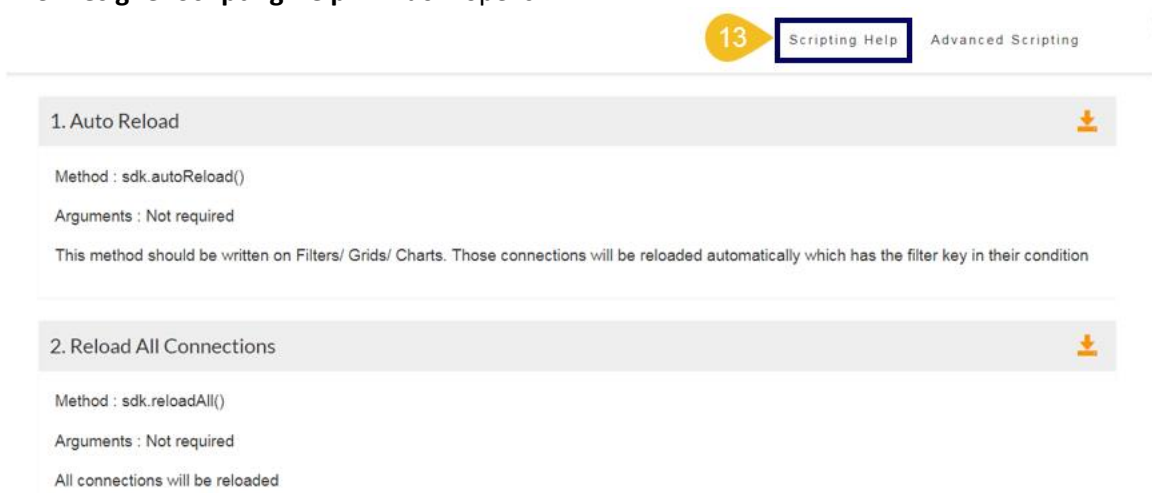
x) The script window for the Checkbox component opens.



- xi) Write the relevant script for the action mentioned above, as explained in the following steps:
- Write the if statement for the script following the order of “changedItem.attributes.Value”
  - Pass ‘Value==1’ (In other words, it suggests that checkbox is enabled)
  - Either click the ‘Help’ icon or use ‘Ctrl+Space’ keys to get the assistance in writing the script.



d. The ‘Designer Scripting Help’ window opens.



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

Scripting Help    Advanced Scripting

**14** 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)

---

**15** 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,
- i. Place the **'Hide Component'** and **'Show Component'** functions under the **'if'** function.
  - ii. Pass Area chart value to the **'Hide Component'** function.
  - iii. Pass Column chart value to the **'Show Component'** function to make sure that the Column chart will be hidden when the Area chart is displayed.

COMPONENTS	CONNECTIONS
Dashboard	
Area2 [ area2 ]	
Column3 [ column3 ]	
Checkbox3 [ checkbox3... ]	

Script Default field values ⓘ ×

```

1 if(changedItem.attributes.Value==1)
2 {
3   sdk.hideComponent( [ 'area2' ] );
4   sdk.showComponent( [ 'column3' ] );
5 }

```

checkbox3

Use Ctrl+Space for assistance or visit [help section](#) for SDK method details

- g. 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'** gets displayed and **'Column chart'** remains hidden. To accomplish this, users need to write the highlighted portion of the script:



**COMPONENTS** CONNECTIONS

Dashboard

Area2 [ area2 ]

Column3 [ column3 ]

**Checkbox3** [ checkbox3... ]

Script

```

1 if(changedItem.attributes.Value==1)
2 {
3   sdk.hideComponent( [ 'area2' ] );
4   sdk.showComponent( [ 'column3' ] );
5 }
6 else
7 {
8   sdk.showComponent( [ 'area2' ] );
9   sdk.hideComponent( [ 'column3' ] );
10 }

```

checkbox3

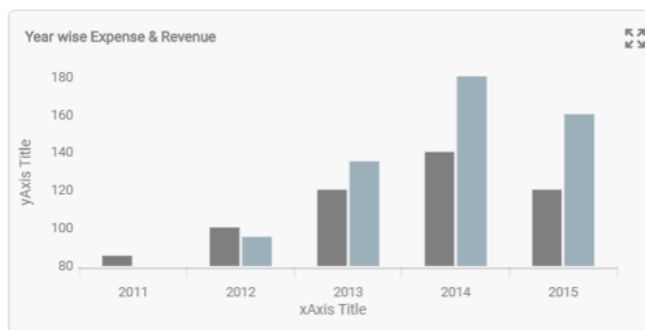
Use Ctrl+Space for assistance or visit [help section](#) for SDK method details

xii) After entering the above script successfully, click the **'Preview'** icon to view the results.



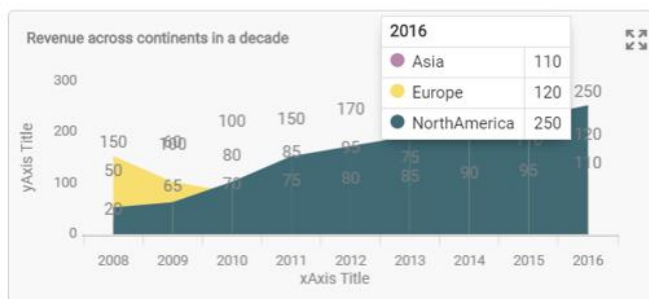
xiii) In the below screen capture, since the **'Checkbox'** is checked, the **'Column chart'** is displayed.

19  Label



xiv) By unchecking the **'Checkbox'** displays the **'Area chart.'**

20  Label



# 11. Managing Options for a Dashboard

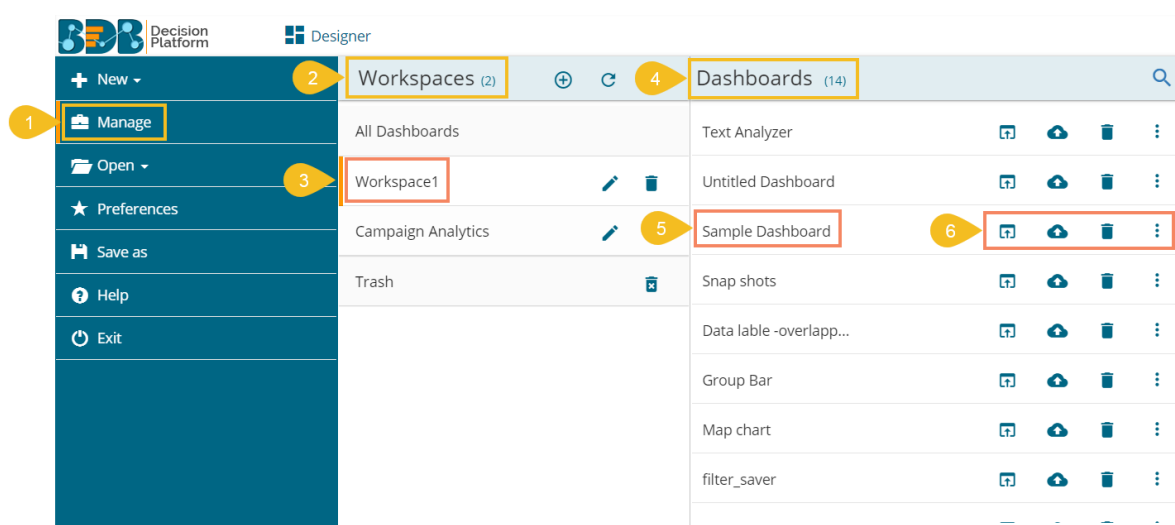
Manage and share your work with others. This section explains how to edit, save, and publish the dashboards created by users.

Generally created dashboards are saved under a workspace. Based upon the 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.

The created and saved dashboards can 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) A list of all the saved dashboards under the selected workspace gets displayed.
- vi) Options provided next to a dashboard name can be used to manage or move that dashboard.



Options provided to a Dashboard:

Option	Name	Description
	Open in Designer	To open a created dashboard in the designer canvas.
	Publish to Portal	To publish a created dashboard onto the portal.
	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
	Preview	Opens preview for the selected dashboard

	Export to Local Disk	Exports the dashboard to a local disk
	Rename	Renames the dashboard
	Move To	Moves the dashboard

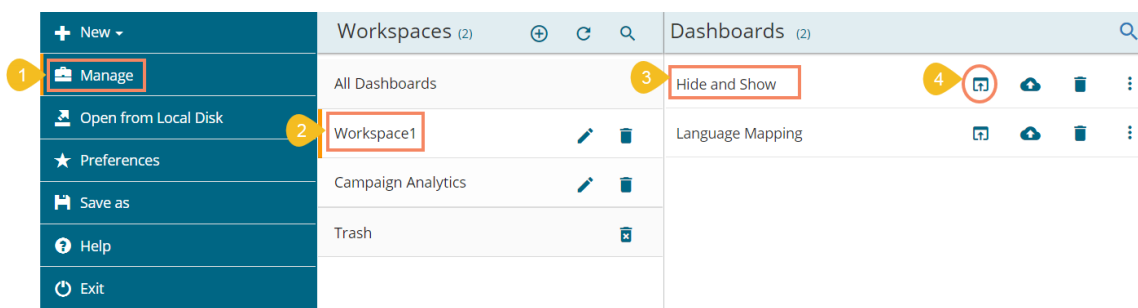
Note: Users can also use the ‘**Manage**’ option to manage the created workspaces.

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

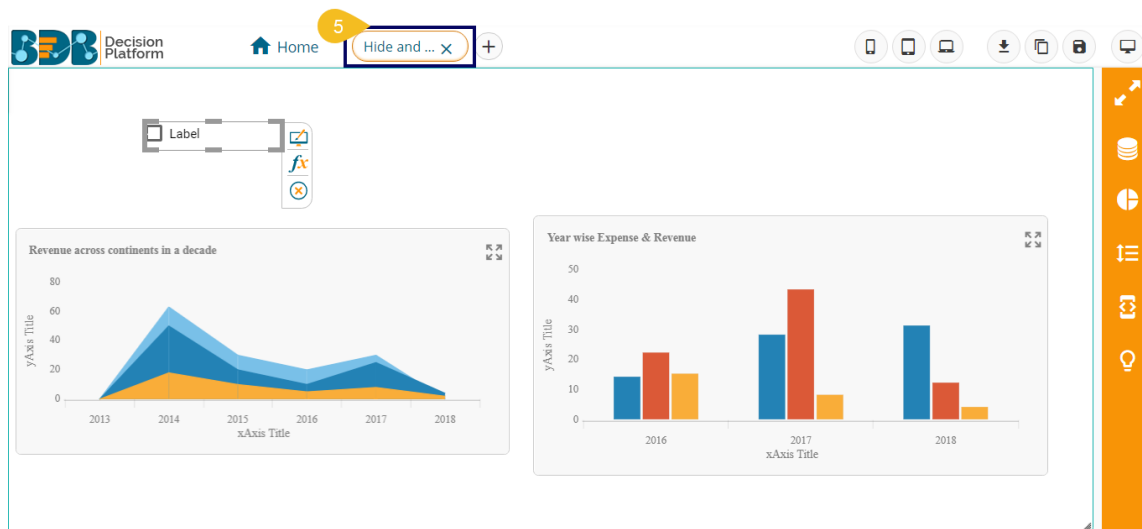
### 11.1. Opening a Dashboard

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.




- v) The selected dashboard opens in the designer workspace.

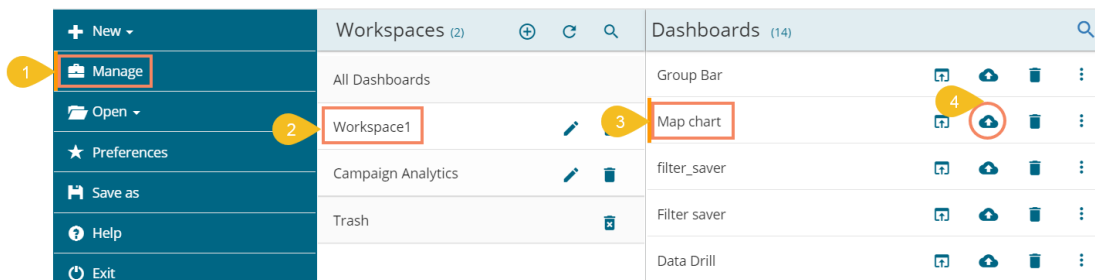


Note: The users can also open a dashboard in the designer canvas by using double clicks on the dashboard name from the list of saved dashboards.

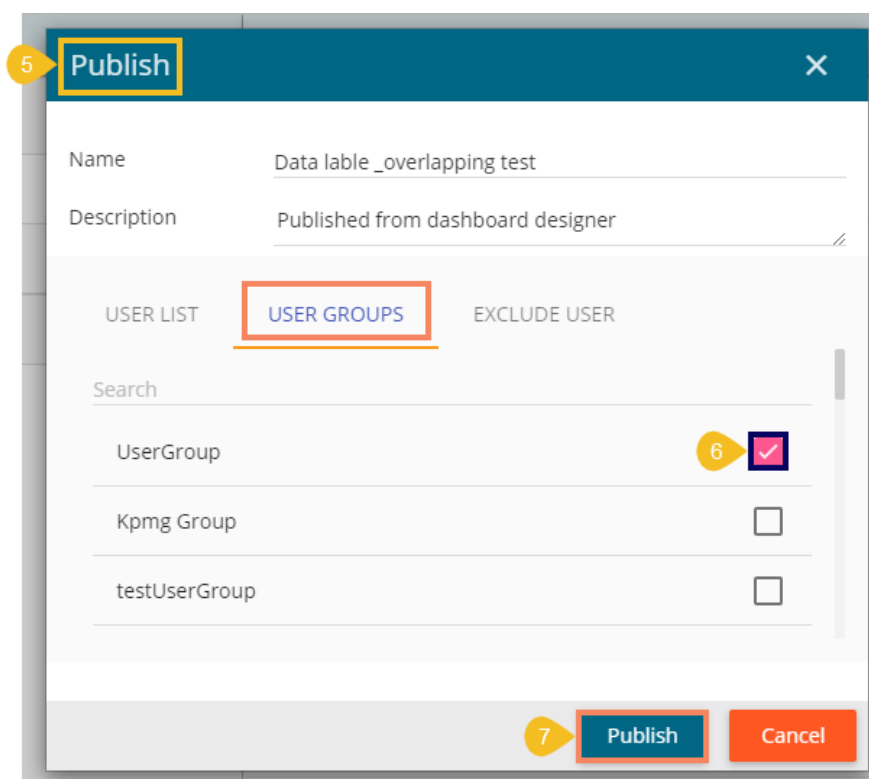
## 11.2. Publishing a Dashboard

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

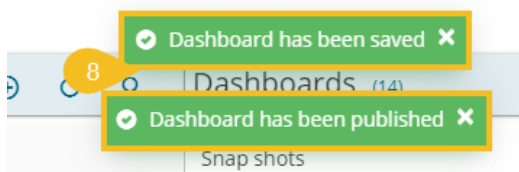
- i) Click the **'Manage'** option on the Designer homepage.
- ii) Select and click on a workspace from the list of Workspaces.
- iii) Select a Dashboard from the list of the saved dashboards under the selected workspace.
- iv) Click the **'Publish to Portal'**  icon.



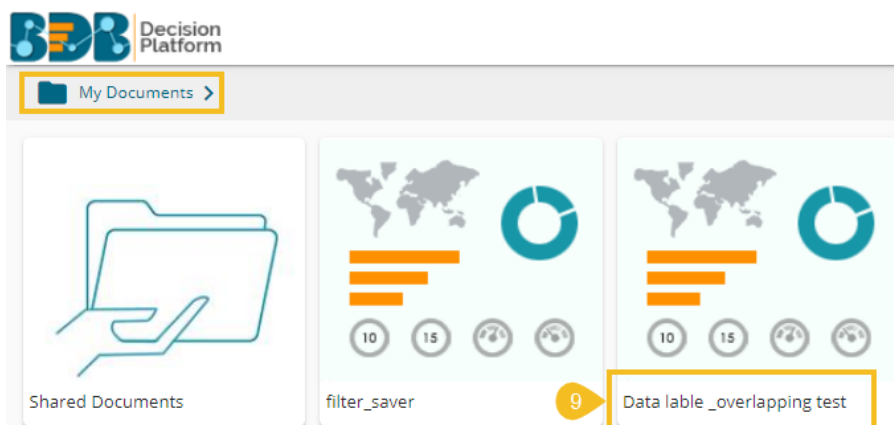
- v) The **'Publish'** dialog box appears to assure the action with the dashboard name and description.
- vi) The user needs to specify a user or user group using the following options:
  - i. **USER LIST:** To select a user or multiple users by using a checkmark in the box
  - ii. **USER GROUPS:** To select a user group or multiple user groups by using a checkmark in the box
  - iii. **EXCLUDE USER:** To exclude a user or multiple users by using a checkmark in the box
- vii) Click the **'Publish'** option.




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



ix) The selected dashboard gets published at the desired place.



Note: For the published dashboard, the below given dialog box appears while clicking the ‘Publish to Portal’  icon.

i) Select an action option out of ‘Re-Publish’ or ‘Publish as New.’

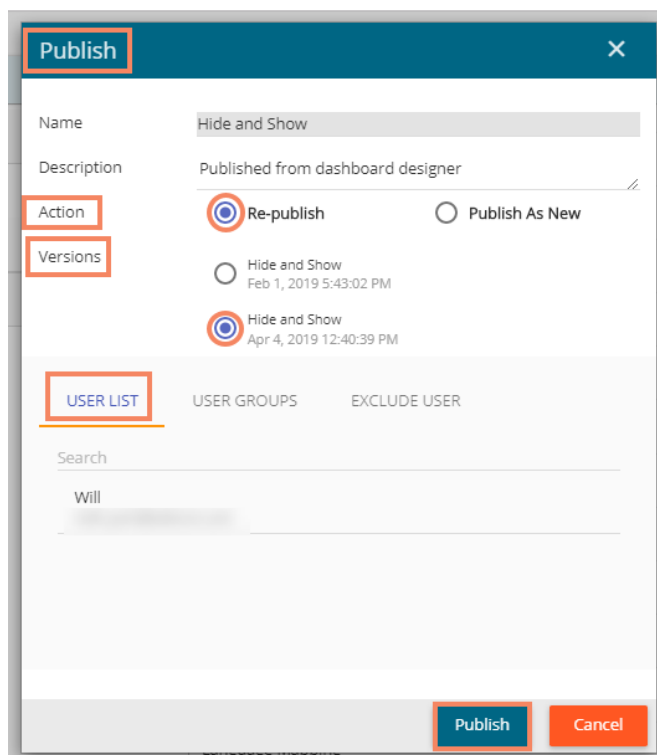
Note:

a. The ‘Republish’ option if selected displays the following details:

- i. The available version(s) of the published dashboard. The user can select a version to republish it.
- ii. The selected user(s) or user group(s) gets appeared in the dialog box.


b. The ‘Publish as New’ action allows the user to publish the selected dashboard as new.

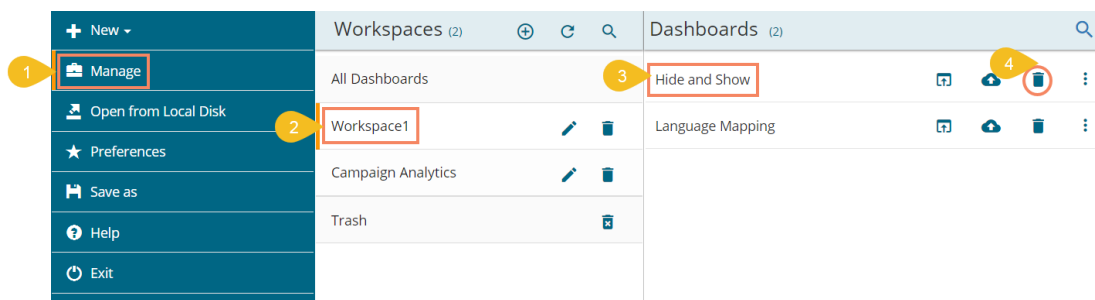
ii) Click the ‘Publish’ option to complete the action.



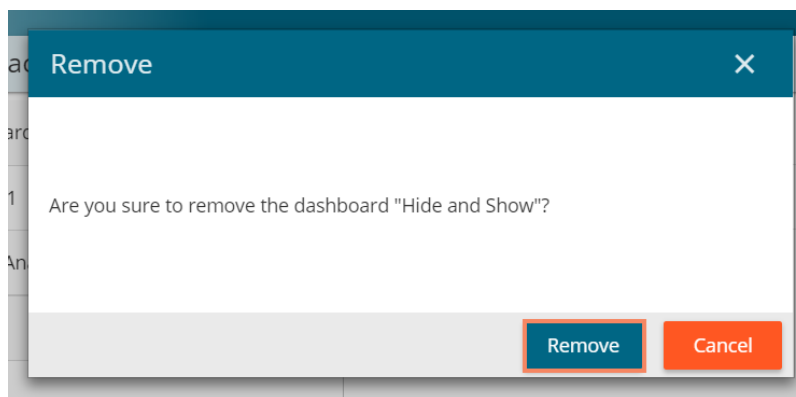
### 11.3. Deleting a Dashboard

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

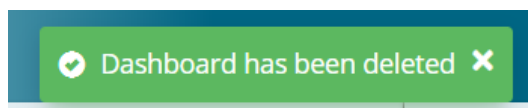
- i) Click the **'Manage'** option on the Dashboard Designer home page.
- ii) Select and click on a workspace from the list of all the Workspaces.
- iii) Select a Dashboard from the list of all the created dashboards under the selected workspace.
- iv) Click the **'Delete'**  icon.



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



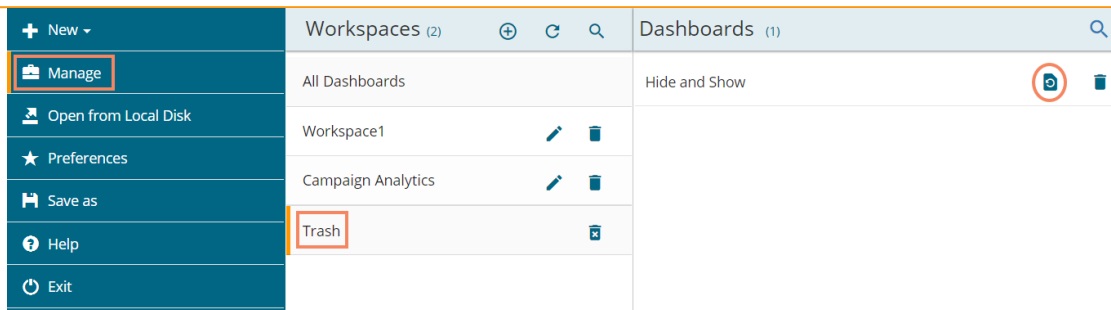
- vii) The selected dashboard gets removed from the list.
- viii) A message appears to notify the completion of the action.



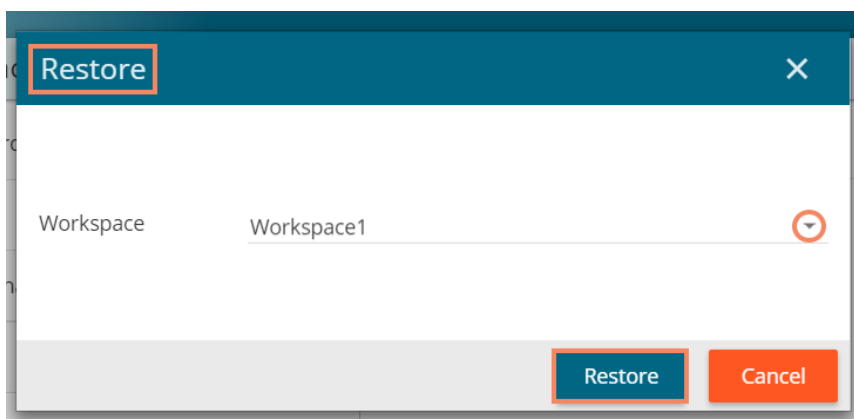
#### 11.3.1. Restoring the Deleted Dashboard

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.

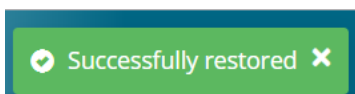
- i) Click the **'Manage'** option from the Designer homepage.
- ii) Navigate to the **'Trash'** workspace created under the list of all the workspaces.
- iii) Select a deleted dashboard that you want to restore and click the **'Restore'**  icon.



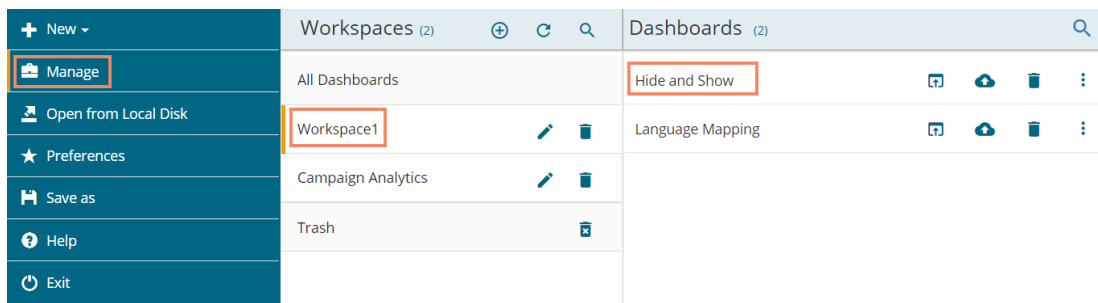
- iv) A new window appears.
  - i. Select a workspace using the drop-down menu.
  - ii. Click the **'Restore'** option.



- v) A success message appears to assure the restoration.



- vi) The dashboard gets restored to the selected workspace.



## 11.4. Actions

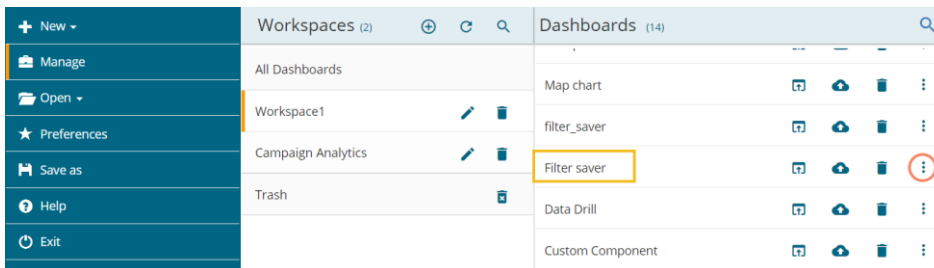
The Actions menu contains some more options like Preview, Export to Local Disk, Rename, and Move to that can be applied on the dashboards.

### 11.4.1. Preview

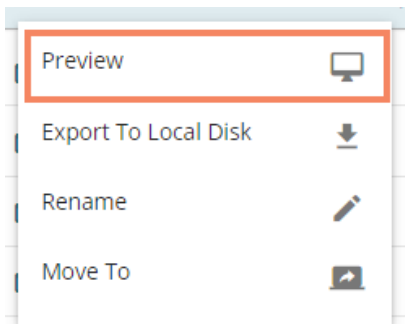
The Preview action option opens the selected dashboard in the preview mode.

- i) Navigate to a saved dashboard using the Manage option.

ii) Select a dashboard and click the 'Action' icon.



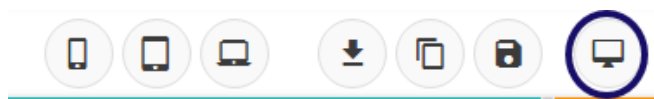
iii) Choose the 'Preview' action from the context menu.



iv) The selected dashboard opens in the Preview mode.



Note: The user gets the Preview icon on the Designer canvas header.

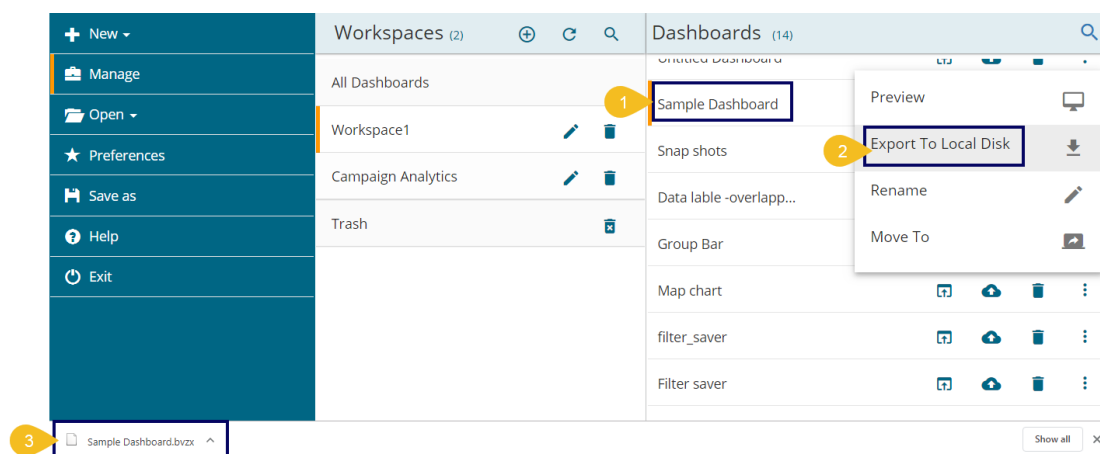


### 11.4.2. Export to Local Disk

The 'Export to Local Disk' option exports the selected dashboard to the local disk.


- i) Select a dashboard using the 'Manage' option.
- ii) Choose the 'Export to Local Disk' option from the action context menu.
- iii) The selected dashboard gets exported to the local disk.

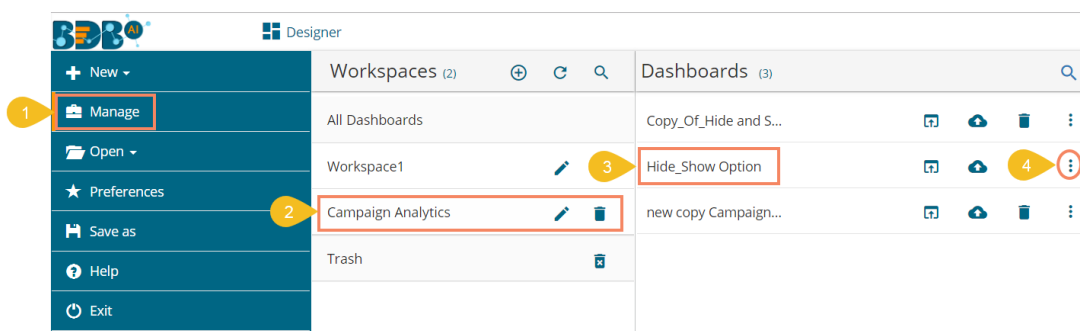





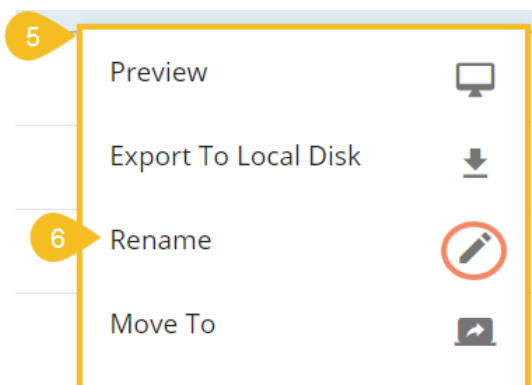
### 11.4.3. Rename

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

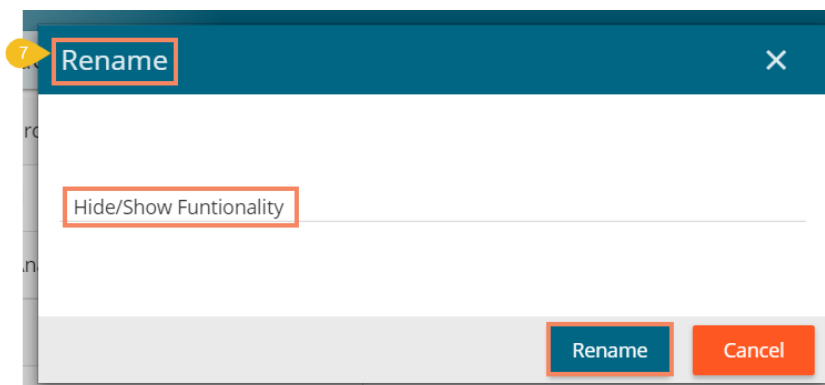
- i) Click the **'Manage'** option on the Designer homepage.
- ii) Select and click on a workspace from the list of Workspaces.
- iii) Select a Dashboard from the list of all the saved dashboards under the selected workspace.
- iv) Click the **'Actions'**  icon.



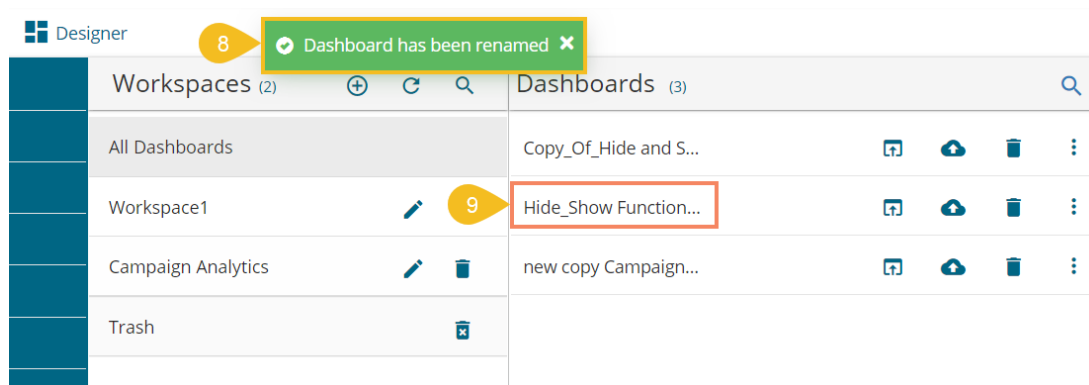
- v) A context menu opens by clicking the **'Actions'** option.
- vi) Click the **'Rename'**  icon



- 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.



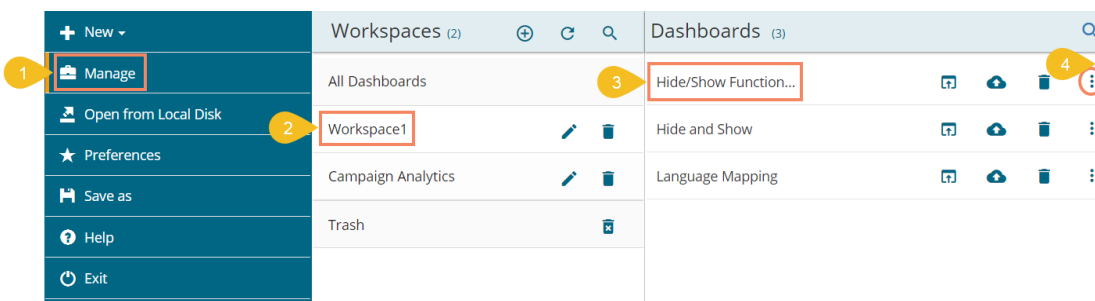
- viii) A success message appears.
- ix) The selected dashboard gets renamed.



#### 11.4.4. Moving a Dashboard

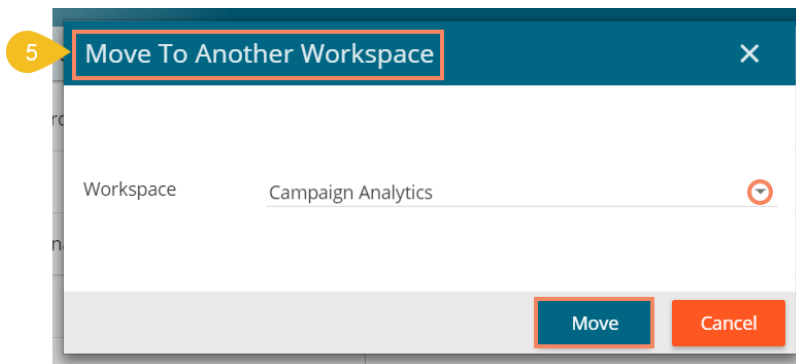
Users can move the created dashboards from one workspace to another using this option. This section explains steps to move dashboards.

- 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.

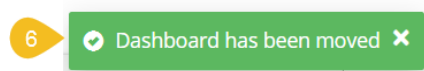


- v) A pop-up window appears to assure the action.
  - a. Select a Workspace from the drop-down menu.

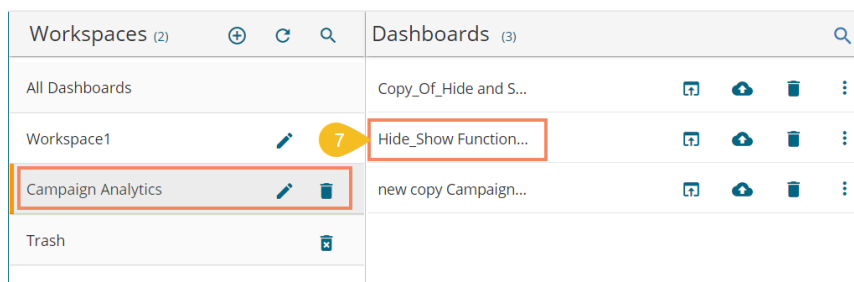
b. Click the **'Move'** option to move the selected dashboard into the desired workspace.



vi) A success message appears.

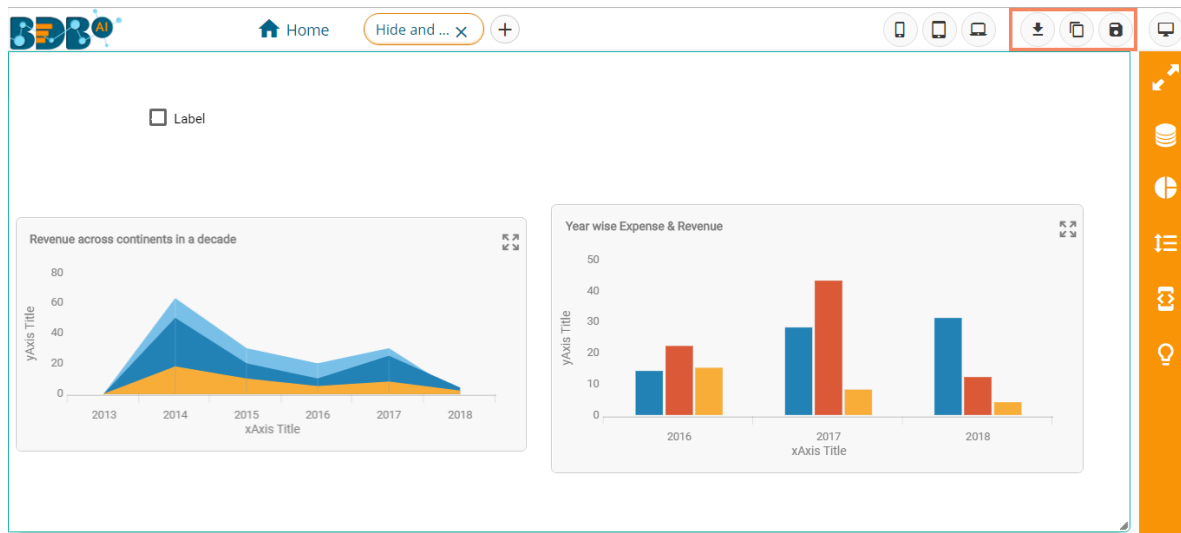


vii) The dashboard gets moved to the selected Workspace.




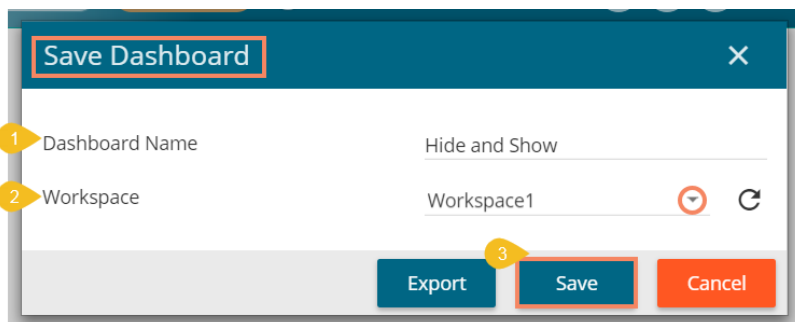
## 12. Saving a Dashboard

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.

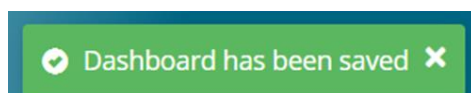


## 12.1. Save

- 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.



- d. A success message appears to assure the same.




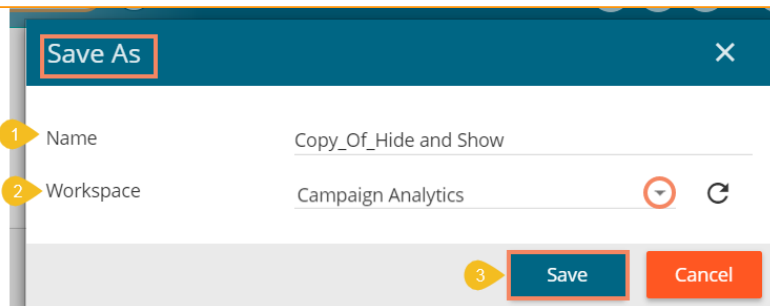
- e. The dashboard gets saved to the selected workspace.

Workspaces (2)		Dashboards (2)	
All Dashboards		Hide and Show	
Workspace1		Language Mapping	
Campaign Analytics			
Trash			

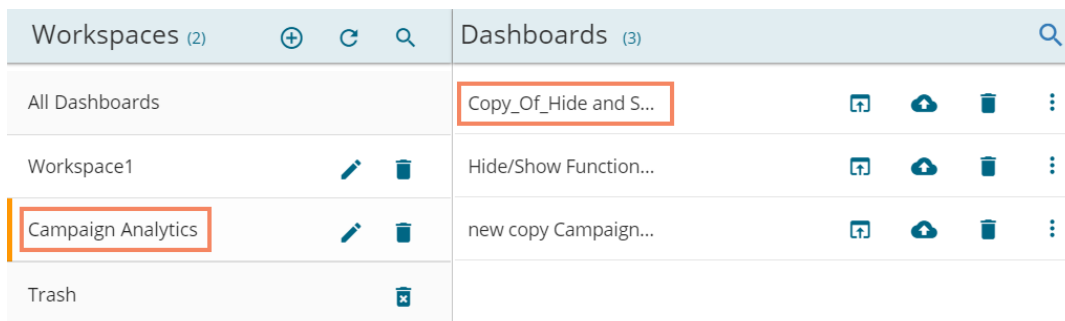
Note: Click the **'Export'** option from the Save Dashboard window to download the selected dashboard.

## 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.




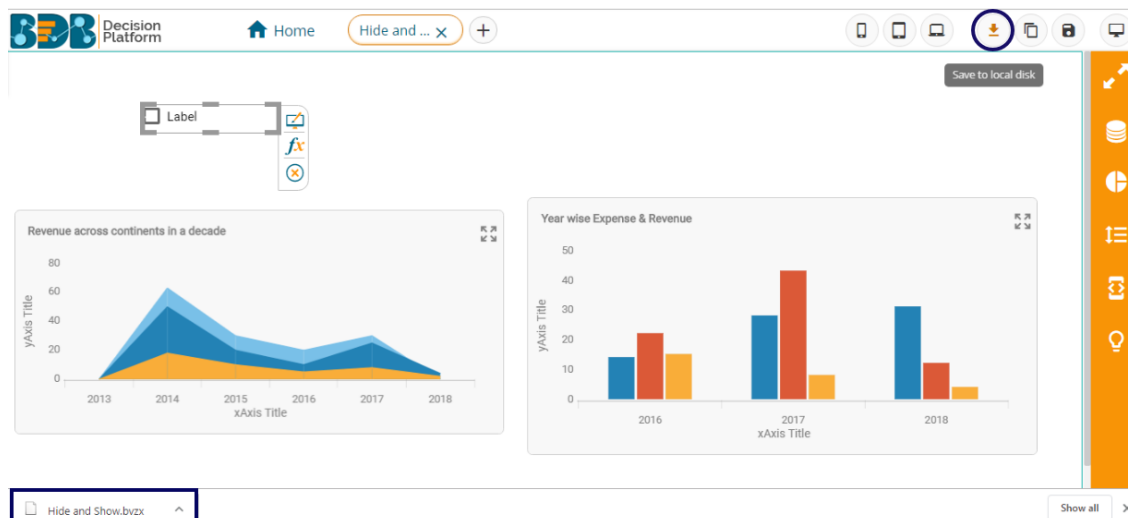
iii) A copy of the selected dashboard gets saved in another workspace.



### 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'  icon from the Designer canvas header menu.
- ii) The selected dashboard gets saved to the local system.



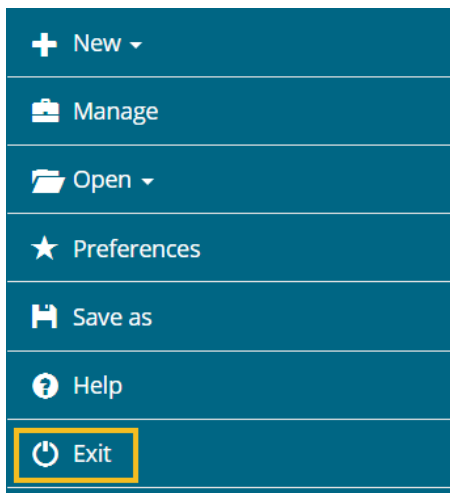
## 13. Signing Out

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

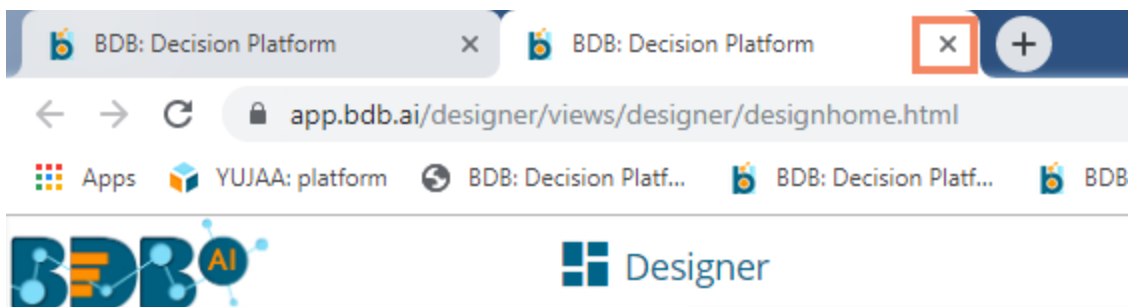
### Closing the BizViz Dashboard Designer:

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

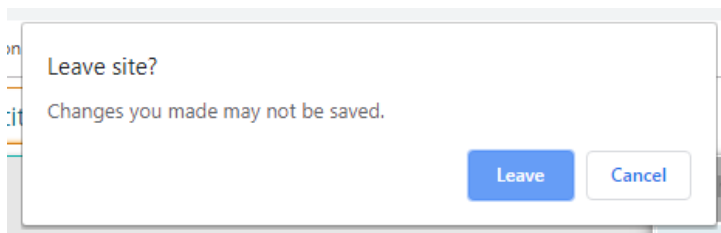
- Click the **'Exit'** option provided on the Designer homepage.




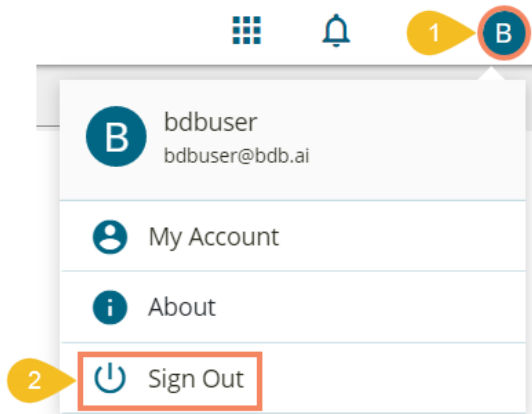
- Click the **'Close'** button (the 'X' on the right edge) of the Dashboard Designer tab



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 **'Cancel'** and then save your work before exiting the page. Select the **'Leave'** option to close the Designer plugin.



- Steps to Sign Out from the BDB Platform
  - i) Click the **'User Profile'** icon  on the Platform homepage.
  - ii) Click the **'Sign Out'** option.



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

**Note:**

- a. By clicking the **'Sign Out'** option, the user gets back to the Sign-in page of the BDB platform.
- b. Click the **'About'** option to open the default welcome page of the BDB Platform.

