User Guide

Dashboard Designer- 6.5

Contents

1. About this Guide 5
   1.1. Document History 5
   1.2. Overview 5
   1.3. Target Audience 5
   1.4. Supported Web Browsers 5
2. Getting Started with BDB Dashboard Designer 6
   2.1. The Guided Tour to the Plugin 7
3. Dashboard Designer Homepage 8
   3.1. New 8
   3.2. Manage 9
   3.3. Open 10
   3.4. Preferences 11
   3.5. Save As 13
   3.6. Help 14
   3.7. Exit 14
4. Workspace 15
   4.1. Creating a Workspace 15
   4.2. Renaming a Workspace 16
   4.3. Deleting a Workspace 17
5. Designer Canvas 19
   5.1. Component Group 20
   5.2. Canvas Properties 22
   5.3. Context Menu Properties 26
6. Connecting to a Data Source 27
   6.1. Connecting to a CSV File 28
      6.1.1. Condition 29
      6.1.2. Calculated Field 29
      6.1.3. Script on Load for a Data Connection 30
   6.2. Connecting to an Excel File 32
   6.3. Connecting to a Data Service 33
   6.4. Connecting to a Data Science Service 34
   6.5. Connecting to a Data Store 35
   6.6. Connecting to a Data Sheet 36

6.7. Connecting to a Websocket 37
6.8. Connecting to a Merged Data 38
6.9. Deleting a Data Connection 39
6.10. Connecting Data Set Connection to a Dashboard Component 40
6.10.1. Dataset Palette 40
6.10.2. Indicator Tab 41
7. Components 42
8. Dashboard Objects 44
8.1. Manage Dashboard Components 44
8.1.1. Dashboard Object Properties 44
9. Data Drill-Down 45
9.1. Passing Default Values 45
9.2. Performing Dynamic Filtering 46
10. Scripting Window 50
11. Managing Options for a Dashboard 55
11.1. Opening a Dashboard 56
11.2. Publishing a Dashboard 57
11.3. Deleting a Dashboard 58
11.3.1. Restoring the Deleted Dashboard 59
11.4. Actions 60
11.4.1. Preview 60
11.4.2. Export to Local Disk 61
11.4.3. Rename 62
11.4.4. Moving a Dashboard 63
12. Saving a Dashboard 64
12.1. Save 64
12.2. Save to Another Workspace 65
12.3. Save to Local Disk 65
13. Options Provided to Published Dashboards 66
13.1. Open in New Tab 68
13.2. Properties 69
13.2.1. Report Burst 71
13.3. Modifying a Dashboard 73
13.4. Adding/Removing a Dashboard to/from Favorites) 74
13.5. Moving a Dashboard 76

13.6. Renaming a Dashboard 78
13.7. Copying and Moving a Dashboard 79
13.8. Deleting a Dashboard 81
13.9. Report Burst 81
13.10. Insert Comments 83
14. Signing Out 84
14.1. Forgot Password Option 86
14.2. Force Login 87

1. About this Guide

1.1. Document History

Product Version	Date (Release Date)	Description
Dashboard Designer 1.0	June 20th, 2015	First Release of the document
Dashboard Designer 2.0	Feb 18th, 2016	Updated document
Dashboard Designer 2.5	Nov 9th, 2016	Updated document
Dashboard Designer 2.5.3	March 16th, 2017	Updated document
Dashboard Designer 3.0	August 31st, 2017	Updated document
Dashboard Designer 3.2	February 2nd, 2018	Updated document
Dashboard Designer 3.5	April 15th, 2018	Updated document
Dashboard Designer 3.5.1	July 5th, 2018	Updated document
Dashboard Designer 3.6	August 20th, 2018	Updated document
Dashboard Designer 3.7	October 10th, 2018	Updated document
Dashboard Designer 3.8	December 1st, 2018	Updated document
Dashboard Designer 4.0	December 31st, 2018	Updated document
Dashboard Designer 4.2	March 25th, 2019	Updated document
Dashboard Designer 4.3	April 24th, 2019	Updated document
Dashboard Designer 4.4	June 7th, 2019	Updated document
Dashboard Designer 4.5	August 5th, 2019	Updated document
Dashboard Designer 5.0	February 17th, 2020	Updated document
Dashboard Designer 5.2.0	August 21st, 2020	Updated document
Dashboard Designer 6.0	February 26th, 2021	Updated document
Dashboard Designer 6.5	September 30th, 2021	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

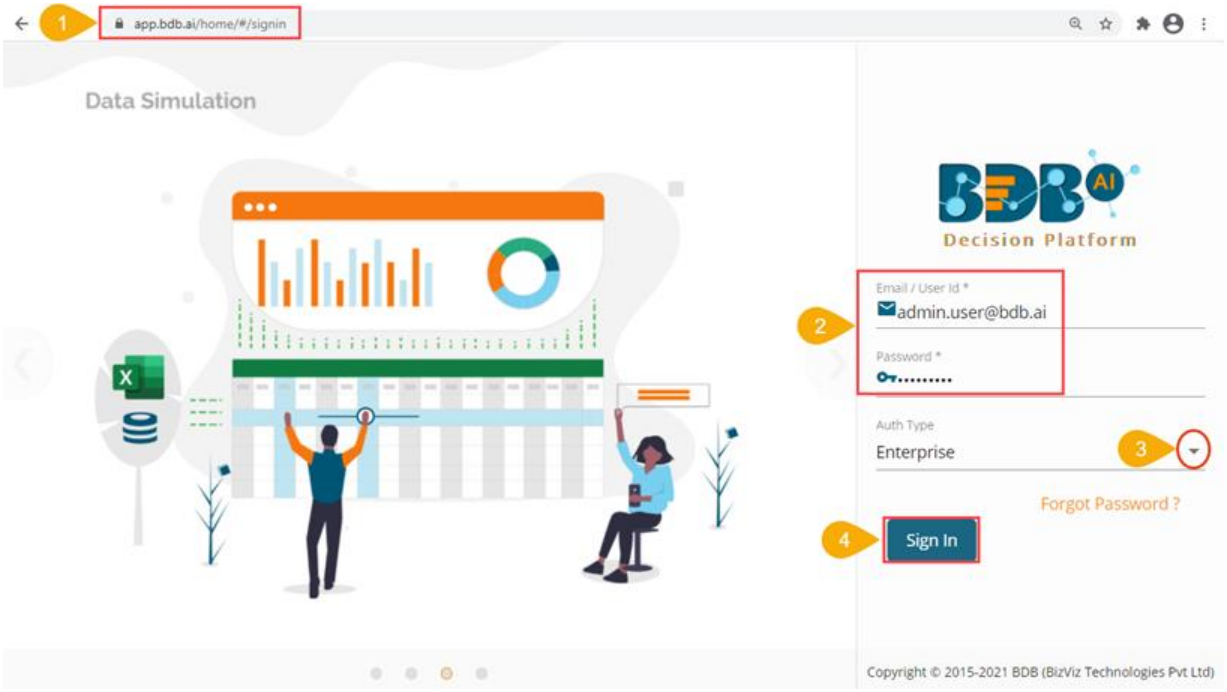
The BDB Platform is a web browser-based application. The users can run the BDB Platform and its various plugins on the below given versions of the browsers:

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

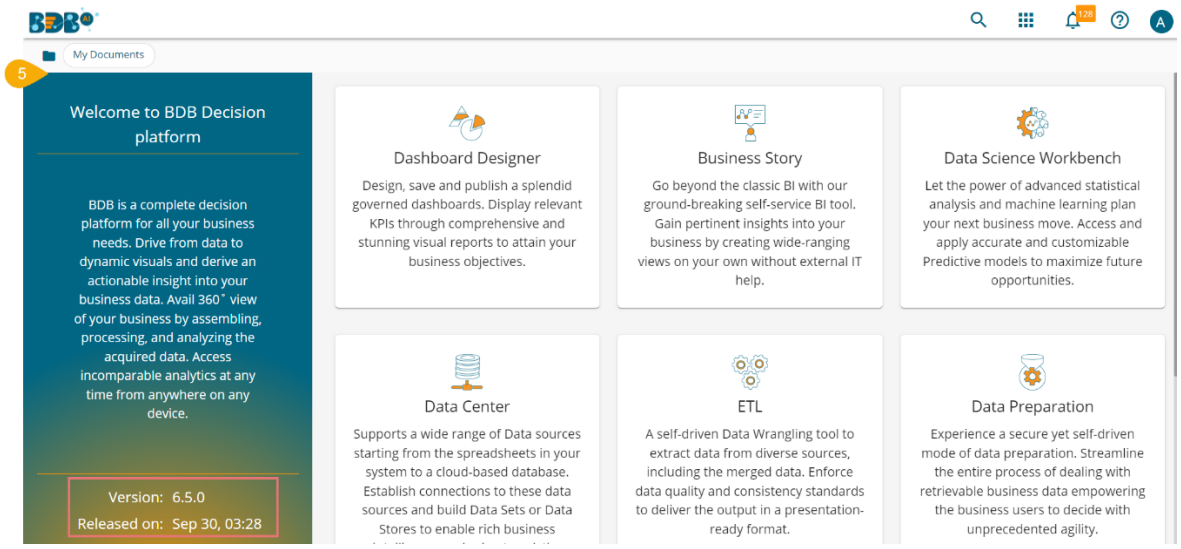
2. Getting Started with BDB Dashboard Designer

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.

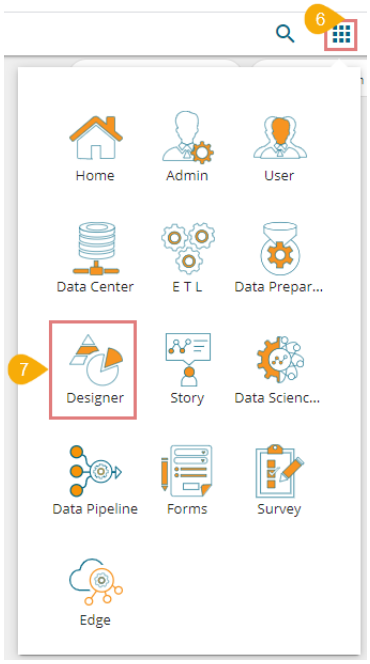


v) BDB Platform homepage opens.

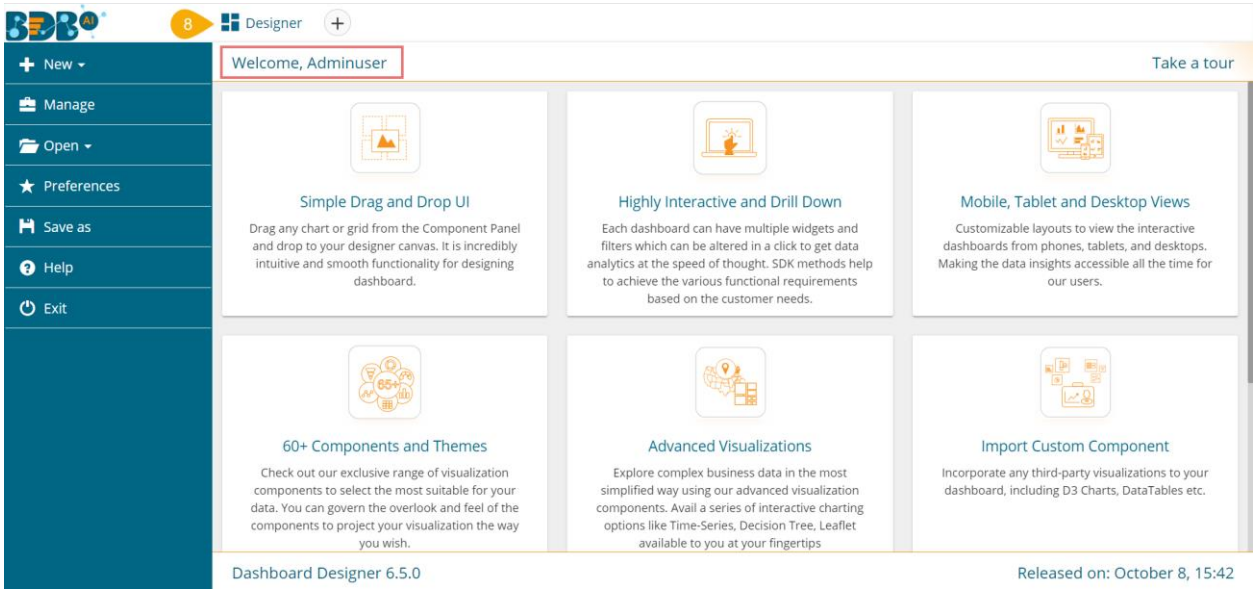


Note: The above screen opens only for those newly created users who have not yet created any document using the BDB Platform.

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



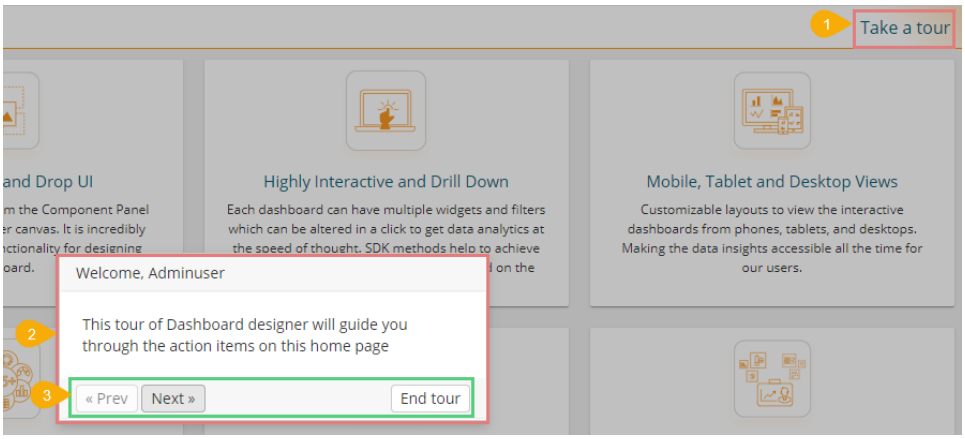
viii) The Designer homepage opens.



2.1. The Guided Tour to the Plugin

The user gets a guided arcoss various important sections of the Designer plugin. The tour begins from the Designer Homepage.

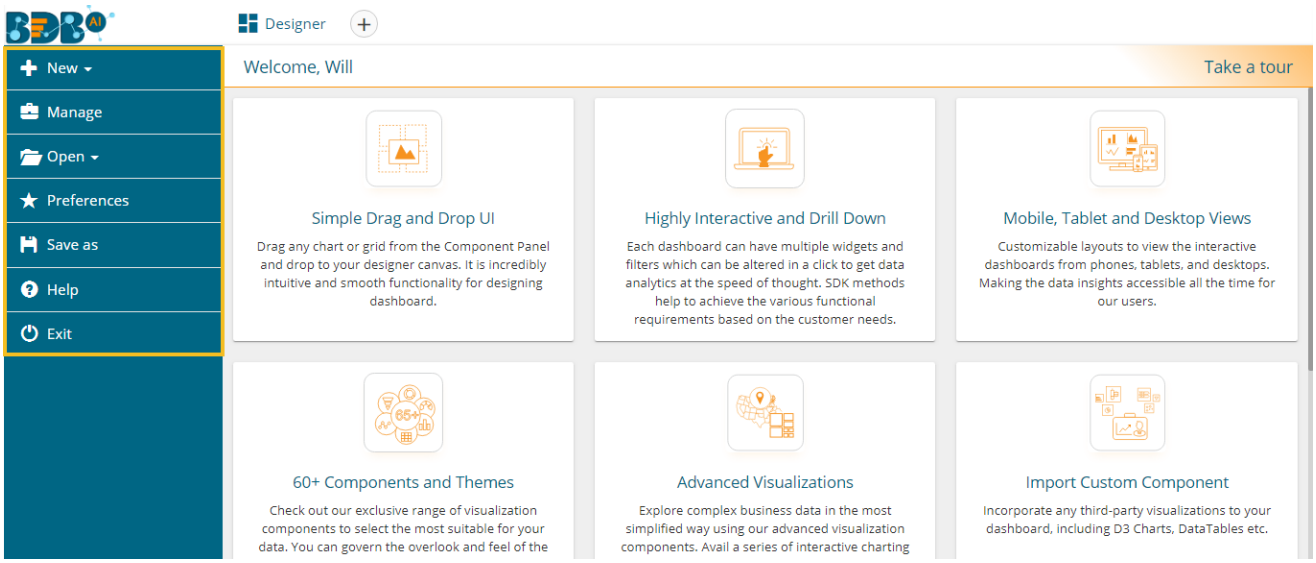
i) Click the '**Take a tour**' option provided on the top right side of the Designer homepage.
ii) A new dialog box opens initiating the landing page tour.
   a. Click the '**Next**' option to move ahead in the guided tour.
   b. Click the '**Prev**'option to go back in the guided tour.
   c. Click the 'End Tour' option if you want to end the tour at any given point (The '**End Tour**' option will get highlighted by default at the end of the guided tour).



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

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.

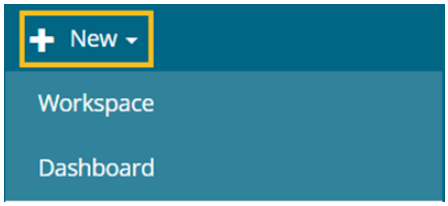


3.1. New

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.

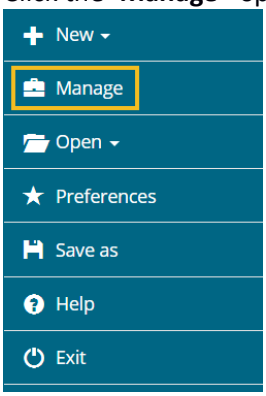
b. **Dashboard**: By clicking this option, the users get redirected to the Designer Canvass to create a new dashboard.



3.2. Manage

i) Navigate to the Designer homepage.

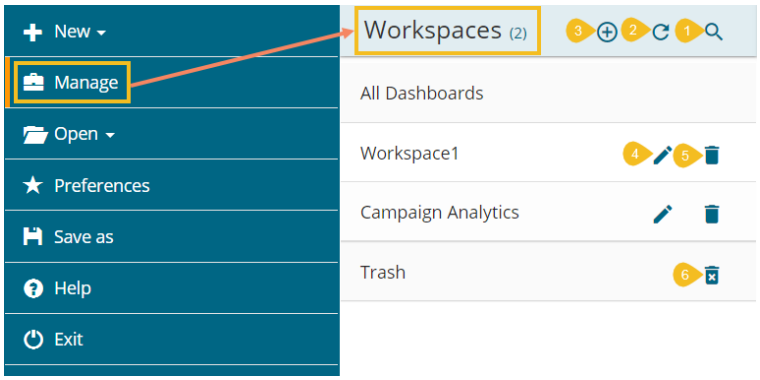
ii) Click the '**Manage**' option.



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

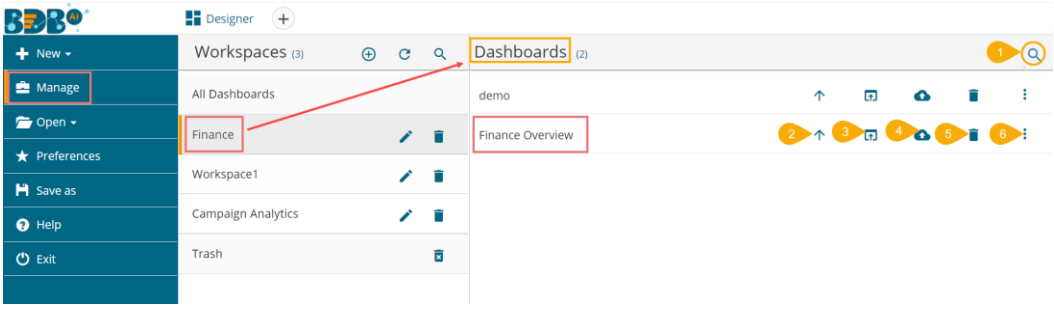


b. Tasks for a Dashboard

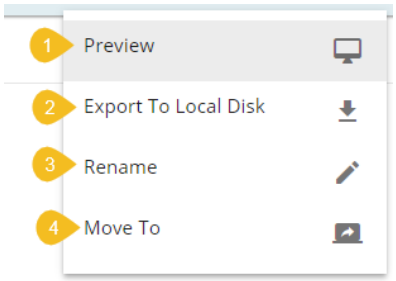
To access the options, the users need to select a dashboard from an existing workspace as displayed in the following image:

i. Search: Searches for a Dashboard
ii. GIT Export: Export a dashboard to GIT
iii. Open in Designer: Opens the dashboard in Designer to Edit or modify
iv. Publish to Portal: Publishes the Dashboard to the portal

v. Remove: Deletes the Dashboard
vi. Actions- Applies the various actions on a dashboard



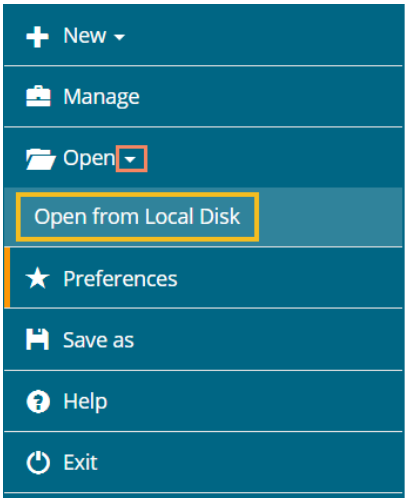
c. Users get the following options while clicking the '**More Actions**' icon provided for a Dashboard.
   i. Preview the dashboard
   ii. Export to Local Disk
   iii. Rename the Dashboard
   iv. Move the Dashboard from one Workspace to another Workspace



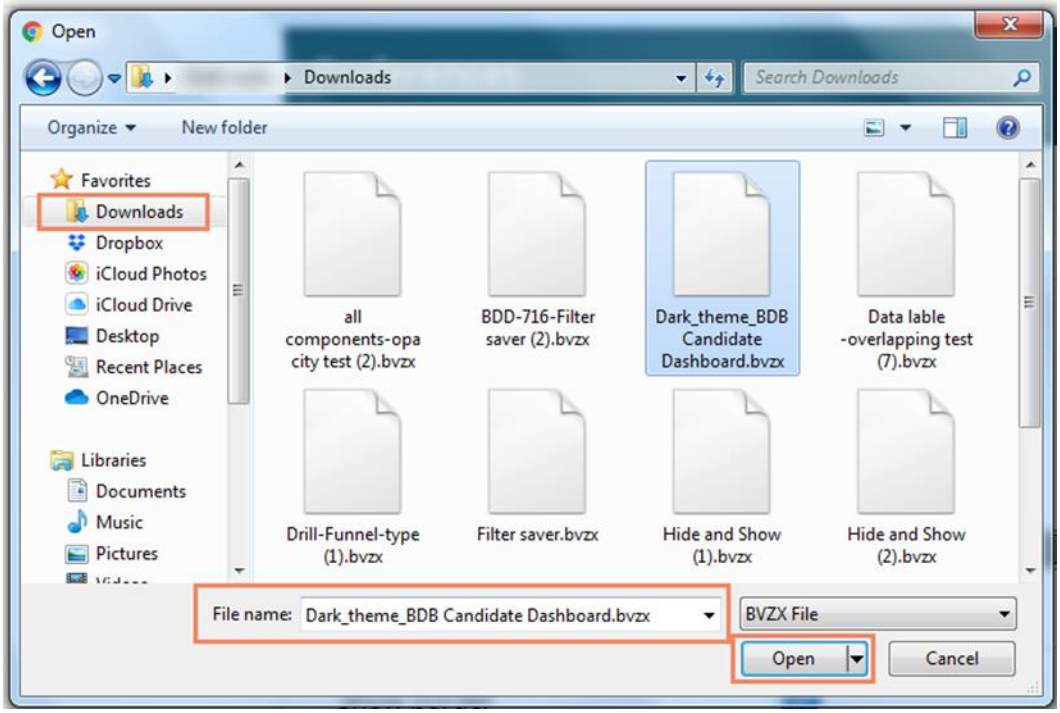
Note: The '**Manage**' options are explained at detailed under Section 4 (for Workspace) and 11 (for Dashboard) of this document.

3.3. Open

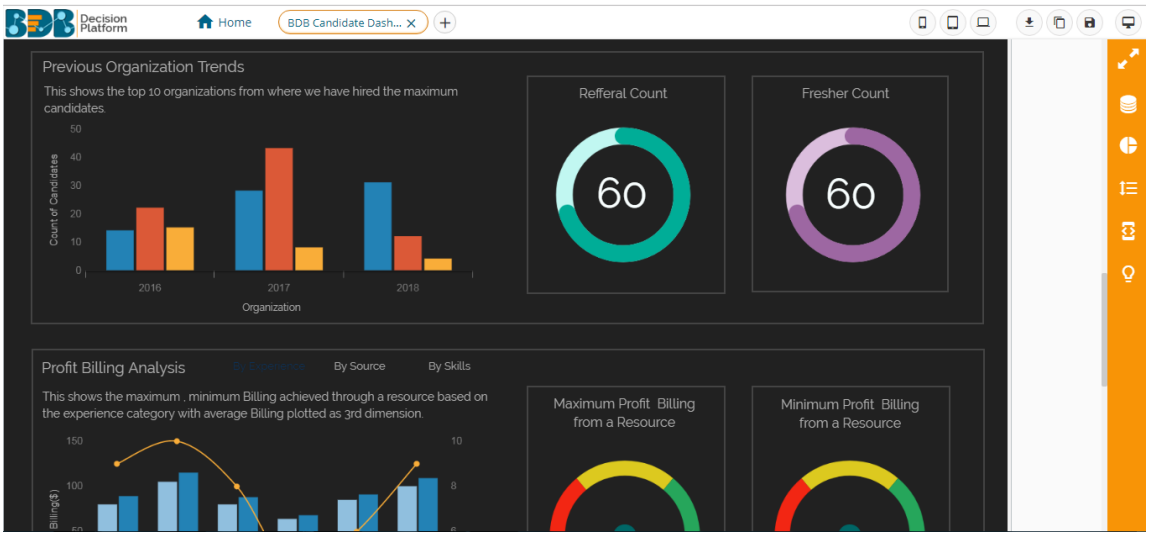
i) Navigate to the Designer homepage.
ii) Click the '**Open**' option from the given options.
iii) The '**Open from Local Disk**' appears.



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



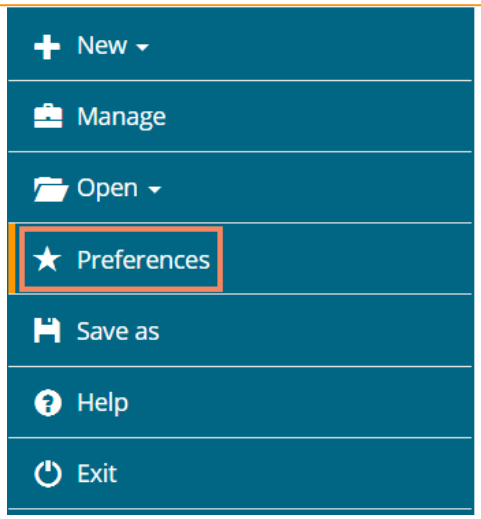
v) The selected dashboard (.bvzx file) opens inside the designer workspace.



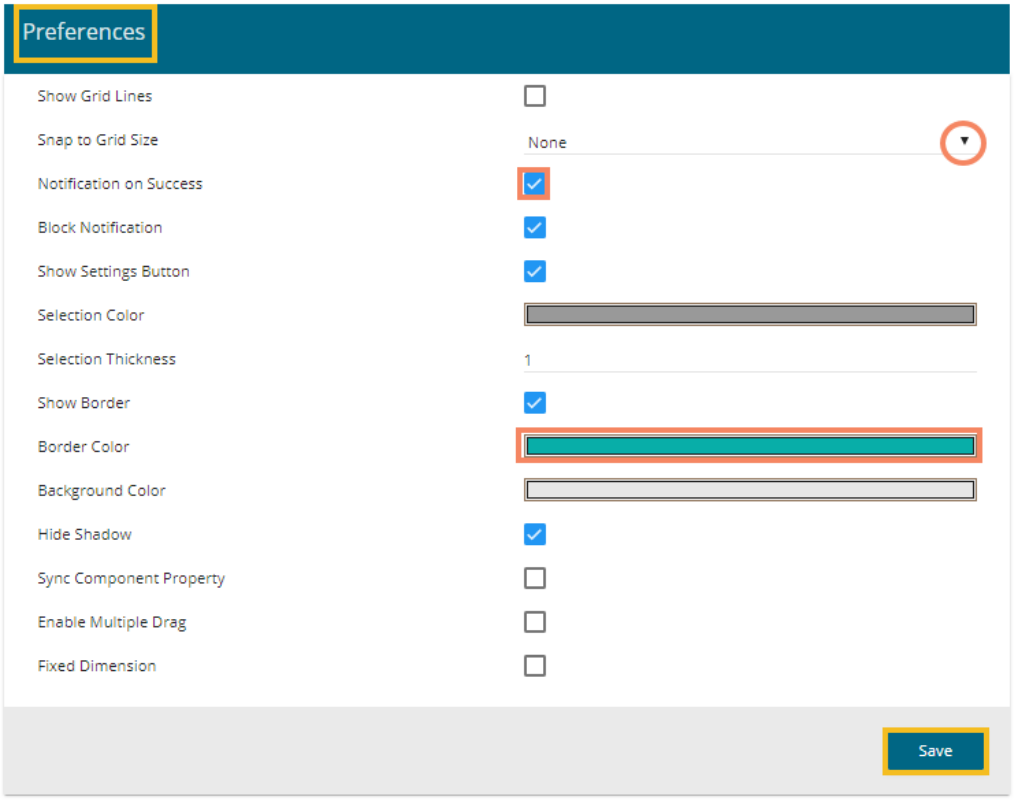
3.4. Preferences

i) Navigate to the Designer homepage.

ii) Click the '**Preferences**' option from the left panel.



iii) The Preferences for a dashboard canvass appear.
iv) Set the desired preferences either by enabling it through a checkmark or select it from the provided menus.
v) Click the '**Save**' option.



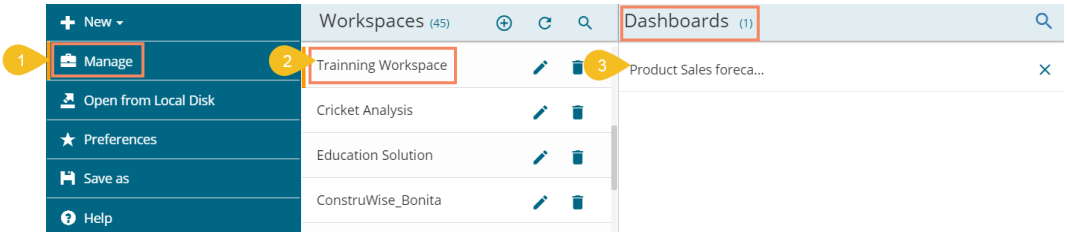
vi) The selected preferences get applied to the dashboard canvass.
vii) The available preferences for a dashboard are as described below:

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.



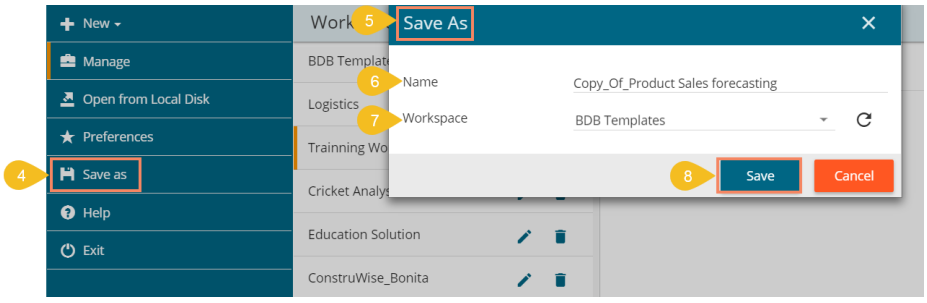
iii) Click the '**Save As**' option from the left panel.

iv) A pop-up window appears to confirm the action.

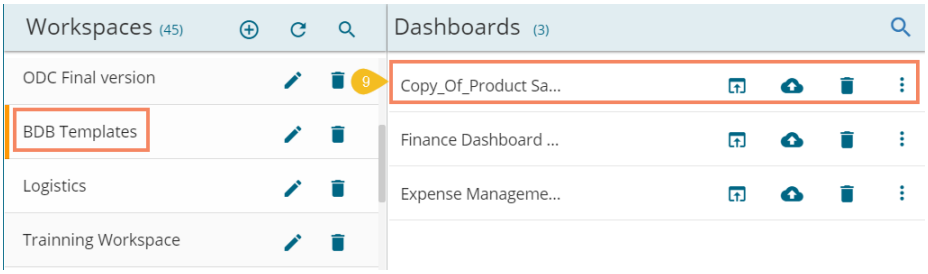
a. The original dashboard name appears with the "Copy_Of" prefix (the users can edit the name as per their wish).

b. Select a workspace from the drop-down menu.

c. Click the '**Save**' option.

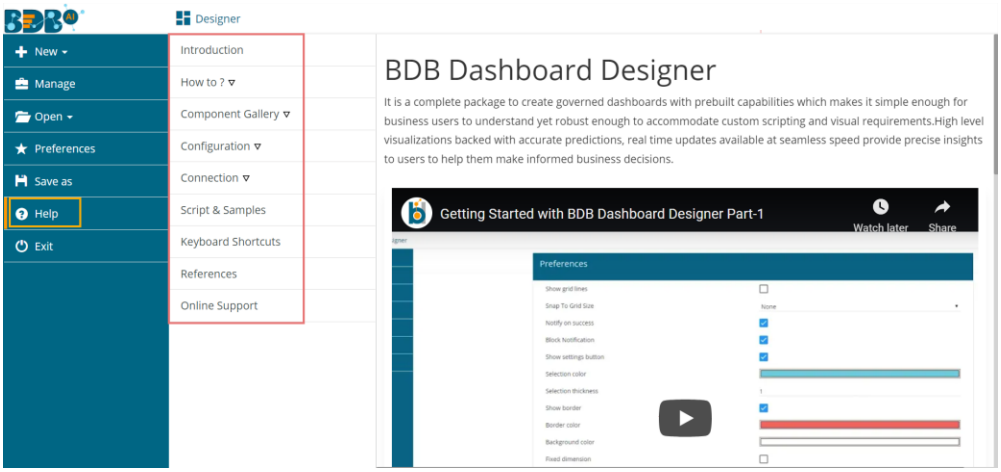


v) A copy of the selected dashboard gets saved in the chosen workspace.



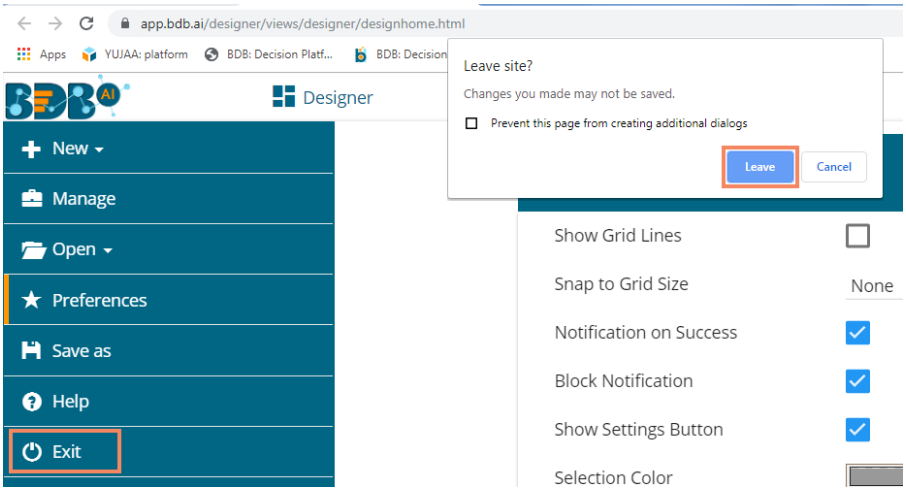
3.6. Help

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 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 the designer tab.

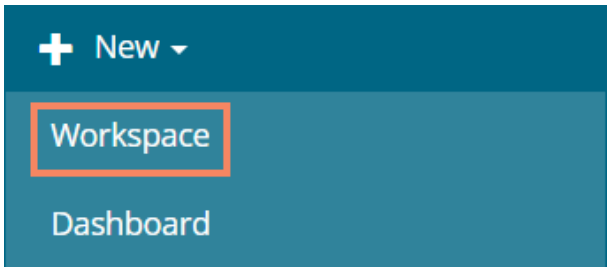
The user gets directed to the BDB Platform home page after closing the designer application.

4. Workspace

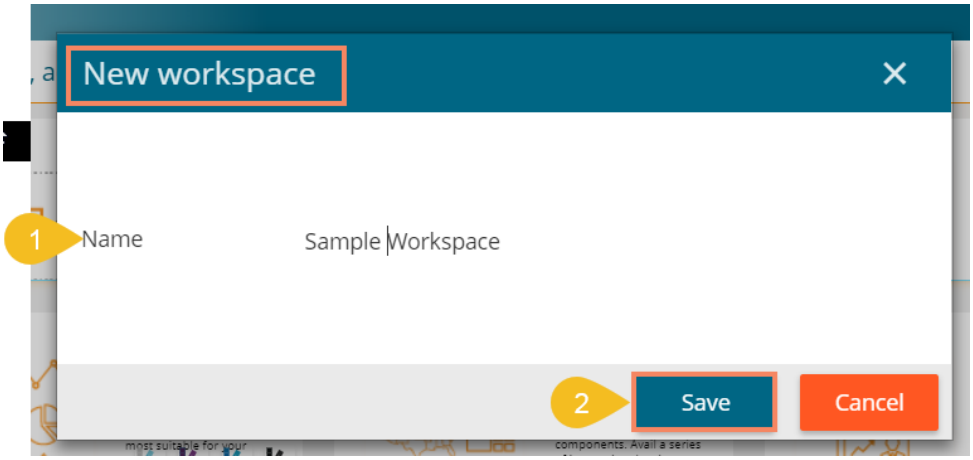
4.1. Creating a Workspace

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

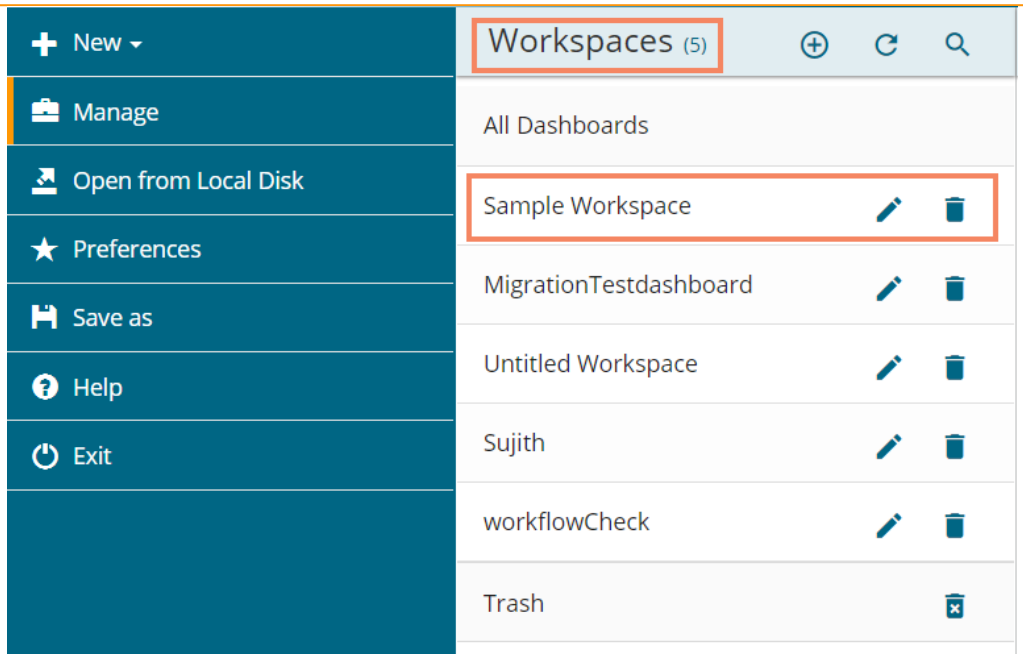
i) Navigate to the Dashboard Designer homepage.
ii) Click '**New**' or Click the '**Add**' option
iii) Click '**Workspace**' from the context menu.



iv) A dialog box appears.
   a. **Workspace Name:** Enter a title for the Workspace in the given field.
   b. Click the '**Save**' option.

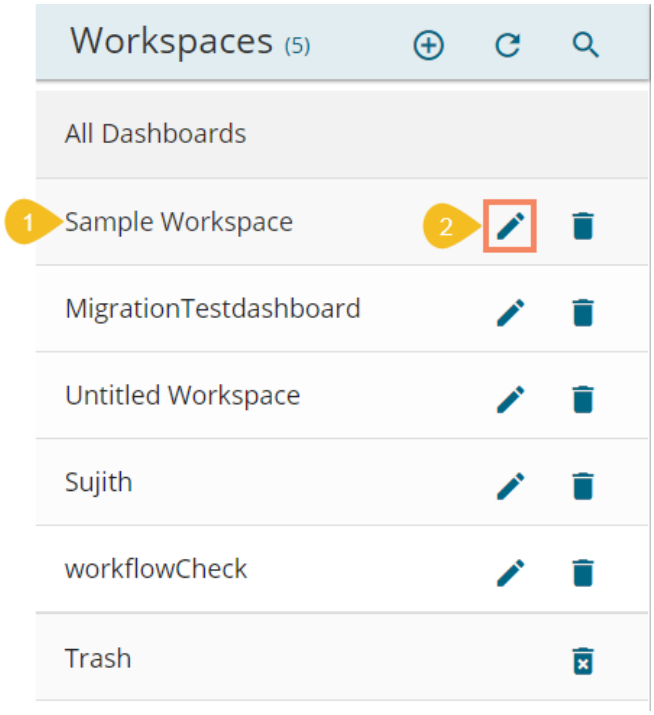


v) The newly created workspace gets saved under the list of the existing **Workspaces**.

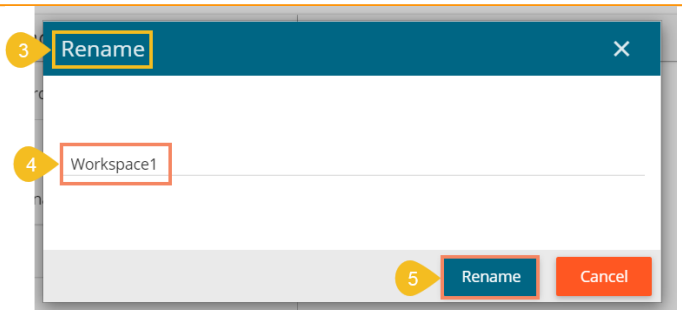


4.2. Renaming a Workspace

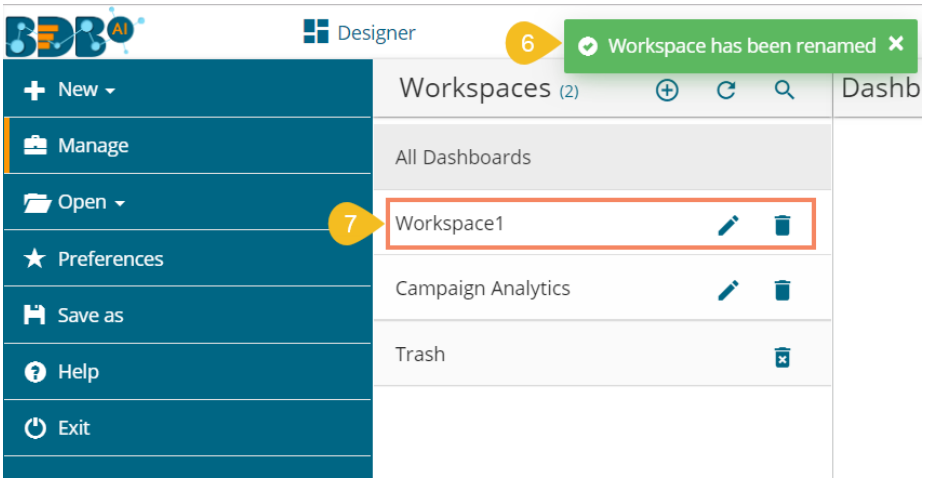
i) Select a workspace from the '**Workspaces**' list.
ii) Click the '**Rename**' icon.



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.

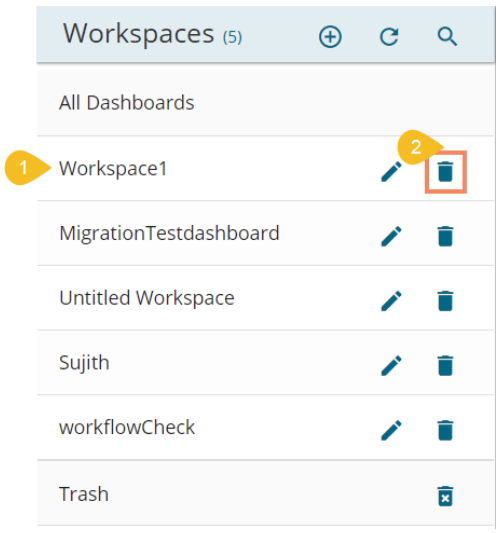


vi) A message appears to assure the success of the renaming action.
vii) The selected workspace gets saved with the new name.

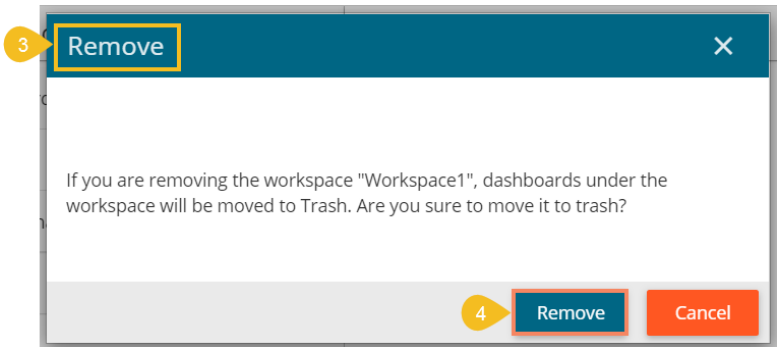


4.3. Deleting a Workspace

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

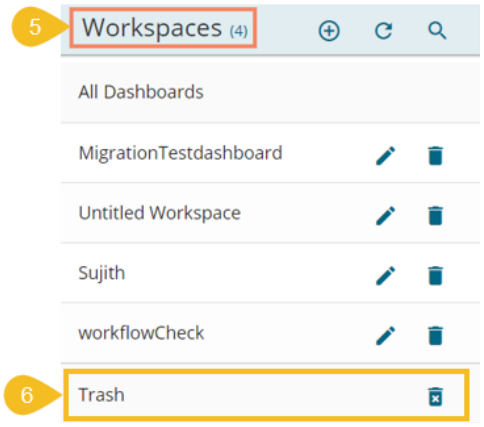


iii) A dialog window appears to confirm the deletion.
iv) Click the '**Remove**' option.



v) The selected workspace gets removed from the list

vi) The removed workspace gets added to the Trash Workspace.

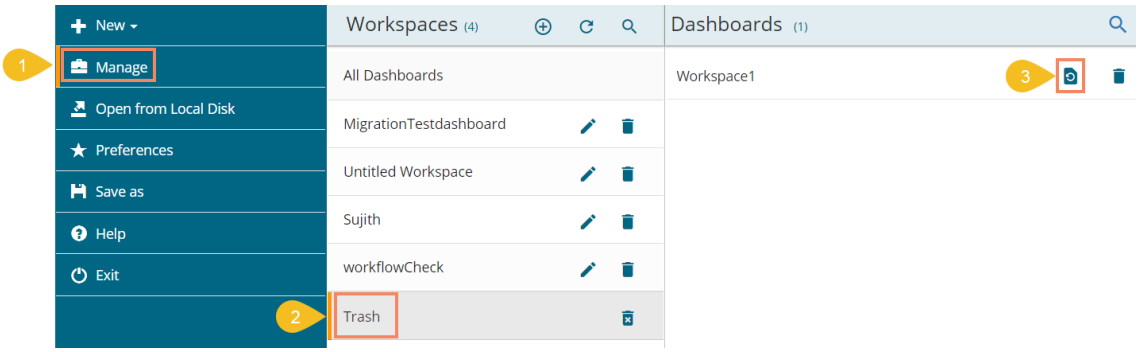


Note:

a. Removing a workspace causes default removal of 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

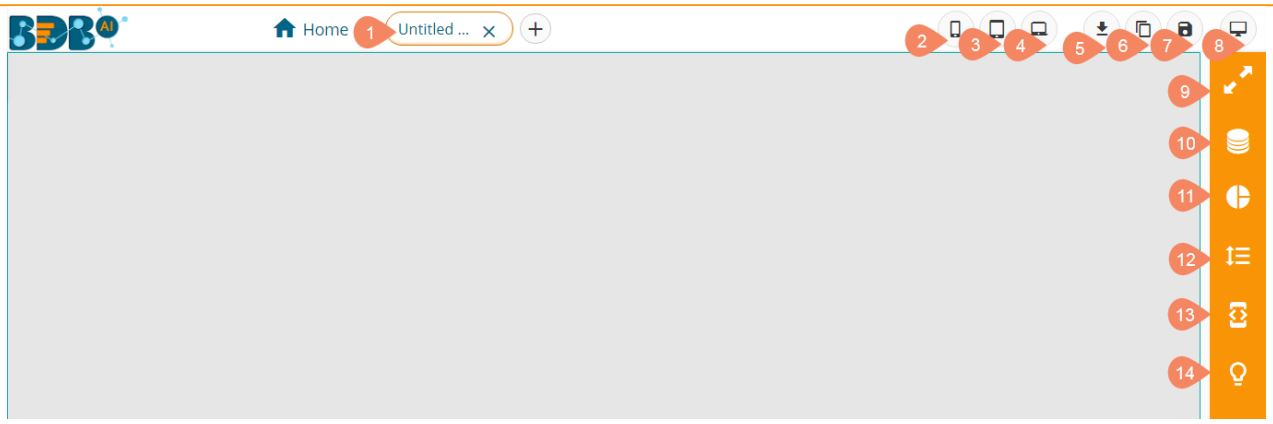
Dashboard Designer space can be understood as a folder that contains Data Source connections, Components, Dashboard Objects, Component Attributes.

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 a 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.



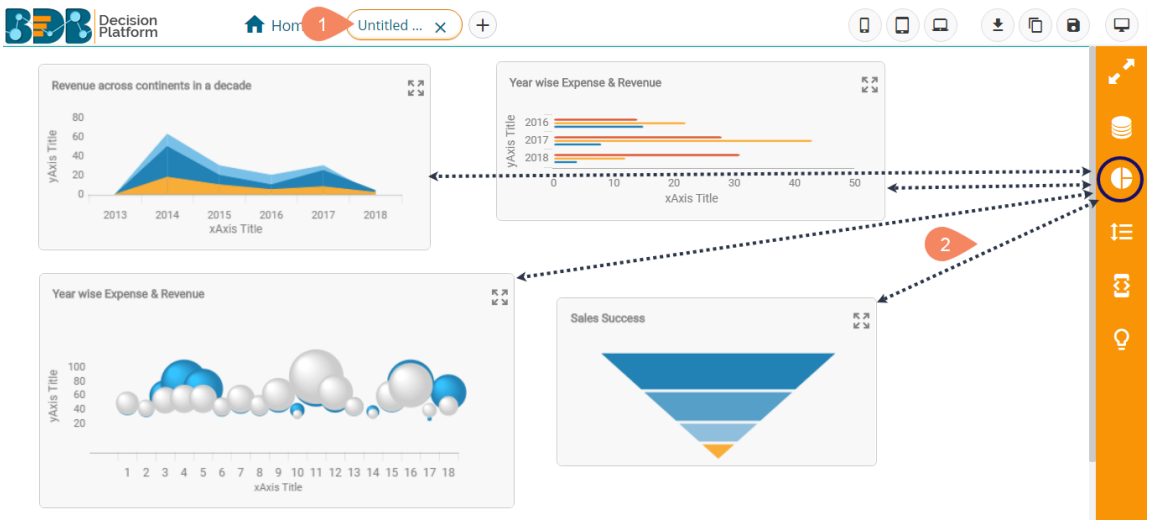
Note:

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.

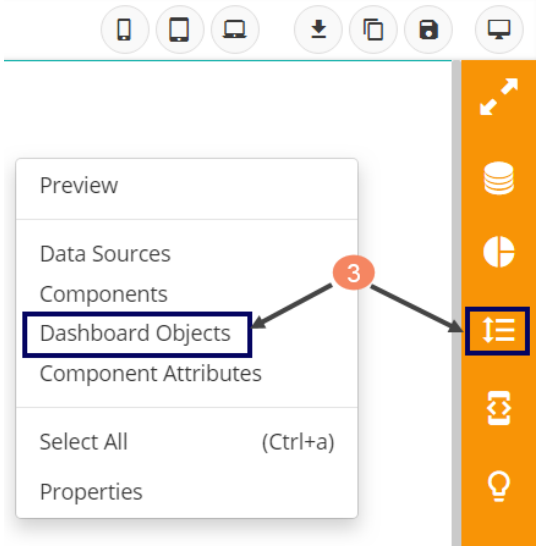
i) Navigate to the Designer Canvas.
ii) Select and drag multiple components to the canvas using the '**Component Library**' icon.



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

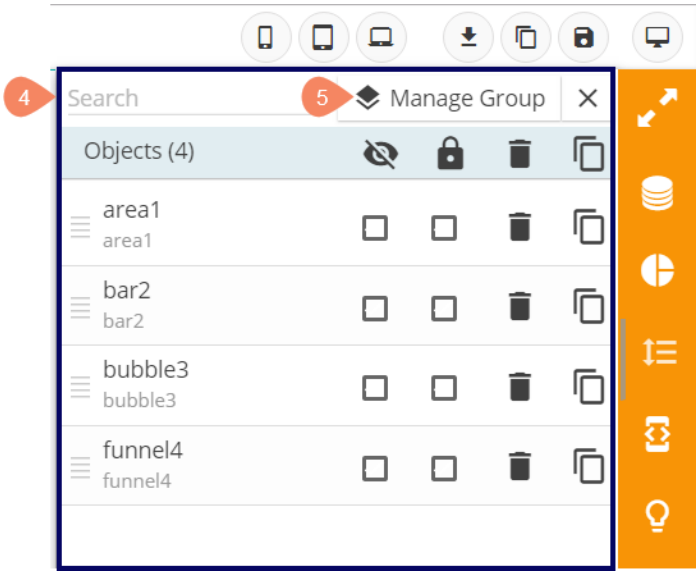
or

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



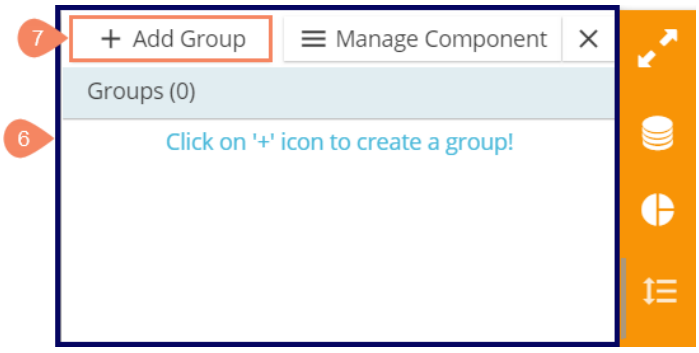
iv) A new panel opens with the dragged components' names.

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



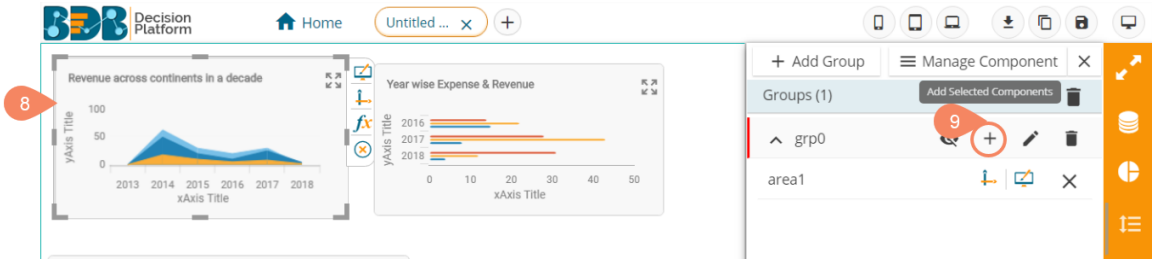
vi) A new window will pop-up to add the group.

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.

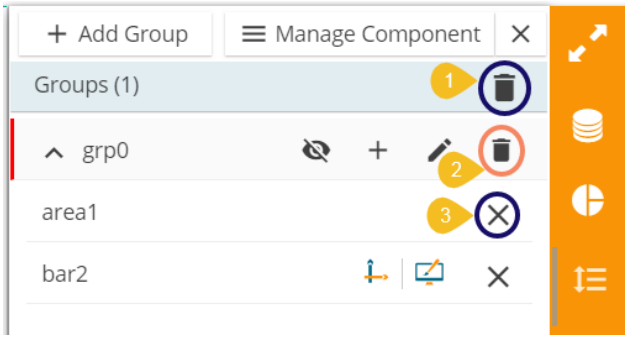


x) Deleting Group or Component: There are 3 options provided to delete either Group or component.

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.



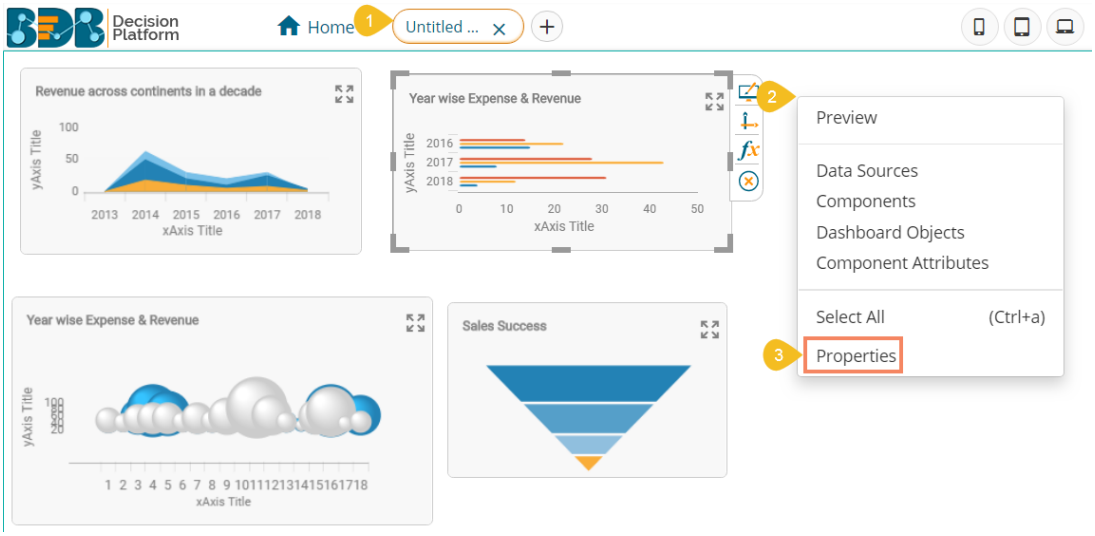
5.2. Canvas Properties

The Designer canvass is provided with specific properties.

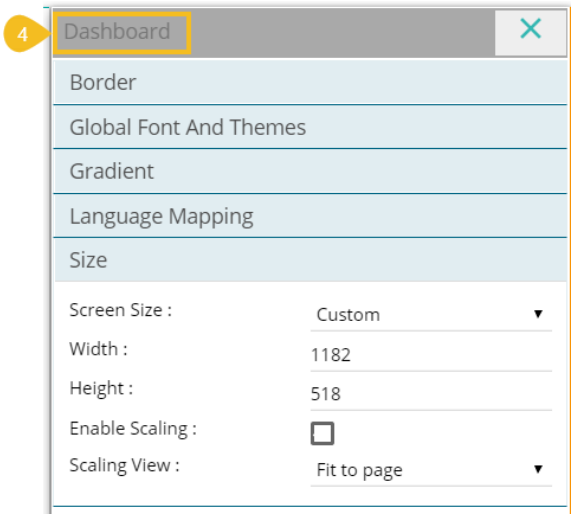
i) Navigate to the Designer canvas.

ii) Use the Right-click anywhere on the canvas.

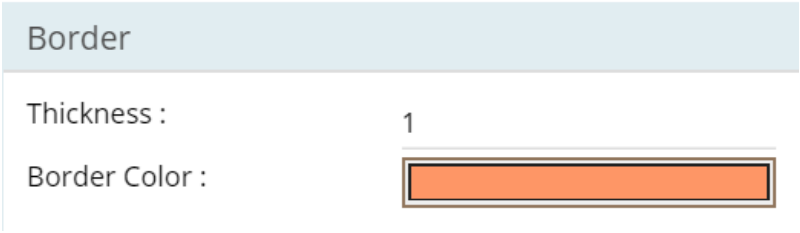
iii) Select the '**Properties**' option from the context menu.



iv) The following Canvas properties will be displayed:

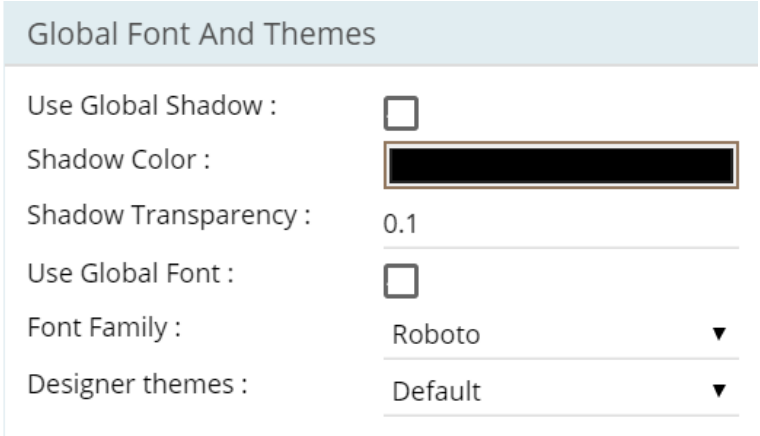


a. Border



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

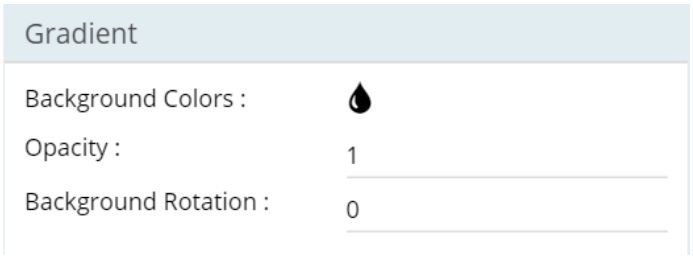
b. Global Font and Themes



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.

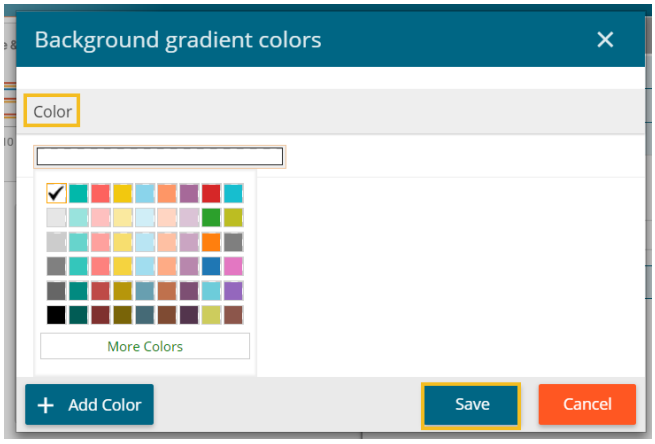
c. Gradient



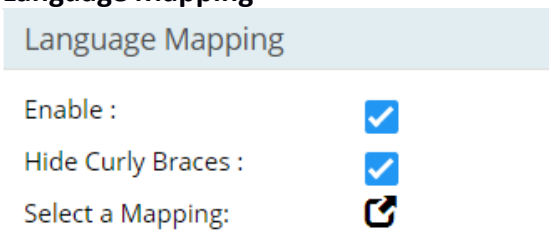
Parameter Name	Description
Background Colors	Users will be directed to select a background color.
Opacity	Set background-color opacity.
Background Rotation	Set the value to rotate background color accordingly

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

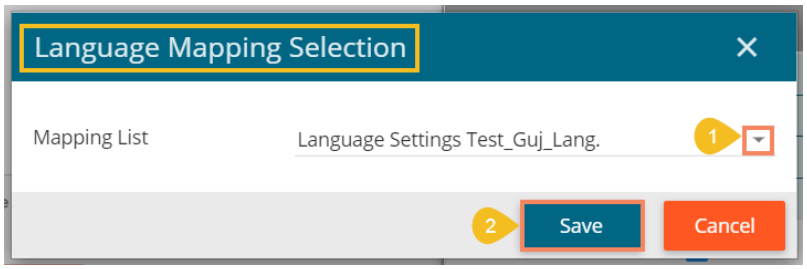


Parameter Name	Description
Enable	Enable this option to apply language mapping functionality.
Hide Curly Braces	Enable this option to hide the curly braces.

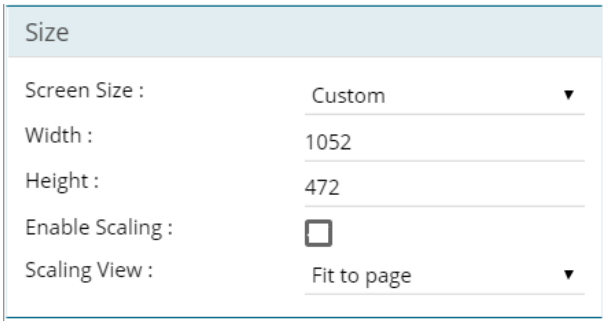
Select a Mapping	Select a language mapping using the drop-down menu.

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.



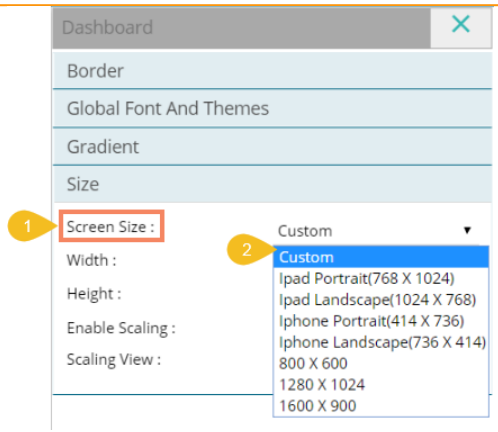
e. Size



Parameter Name	Description
Screen Size	Select an option from the drop-down menu.
Width	Increase/decrease the width of the dashboard.
Height	Increase/decrease the height of the 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 canvass and selected.

Steps to Access the Context Menu Properties:

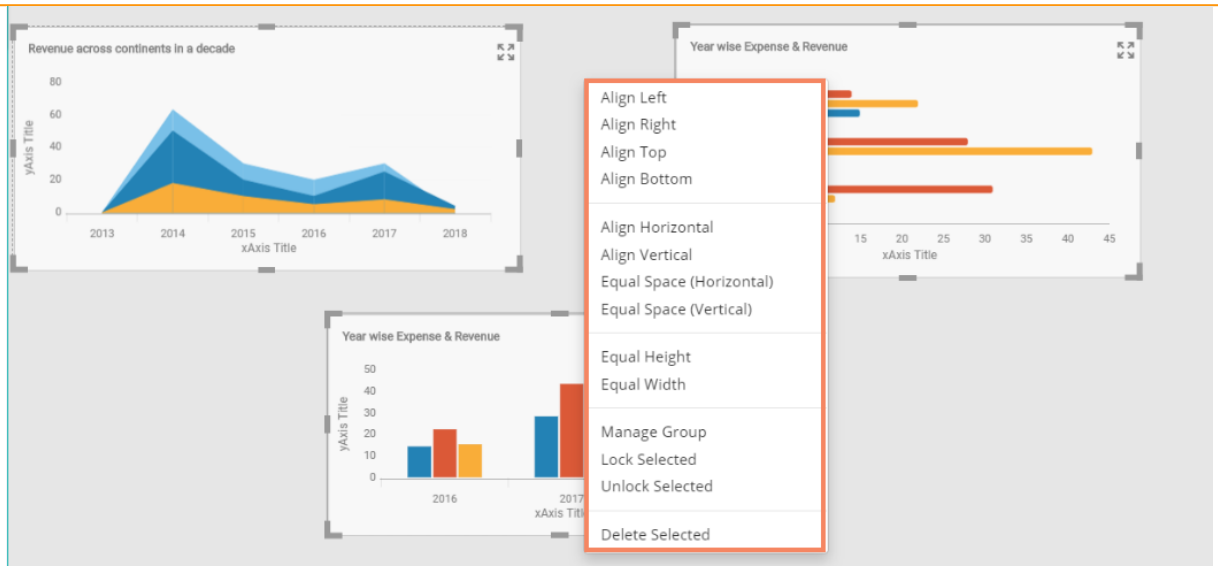
i) Drag multiple components into the designer canvas (At least three components to avail all the properties).

ii) Select multiple components from the canvas. (At least three)

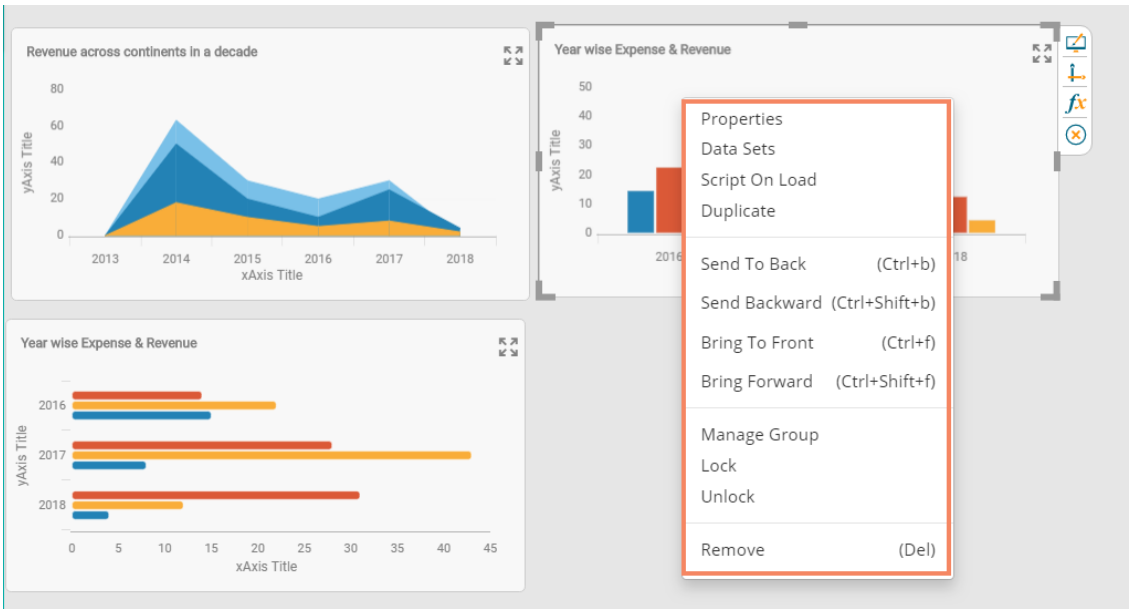
iii) Use right-click to open the context menu.

iv) The following properties will be listed in the context menu:

a. Align Left: All the selected components get aligned to the left.
b. Align Right: All the selected components get aligned to the right.
c. Align Top: All the selected components get aligned to the top.
d. Align Bottom: All the selected components get aligned to the bottom.
e. Align Horizontal: All the selected components get aligned horizontally.
f. Align Vertical: All the selected components get aligned vertically.
g. Equal Space (Horizontal): All the selected components get equal space horizontally.
h. Equal Space (Vertical): All the selected components get equal space vertically.
i. Equal Height: All the selected components get an equal height.
j. Equal Width: All the selected components get an equal width.
k. Manage Group: The user gets redirected to manage the group.
l. Lock Selected: All the selected components get locked.
m. Unlock Selected: All the selected components get unlocked.
n. Delete Selected: To delete the selected components.



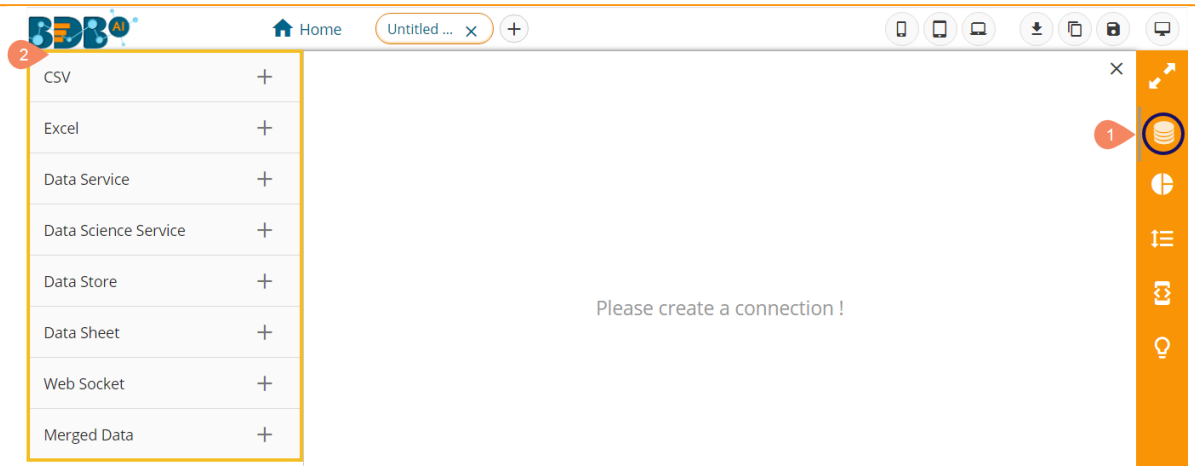
Note: Each dragged component is provided with a context menu containing a list of options as shown in the below image:



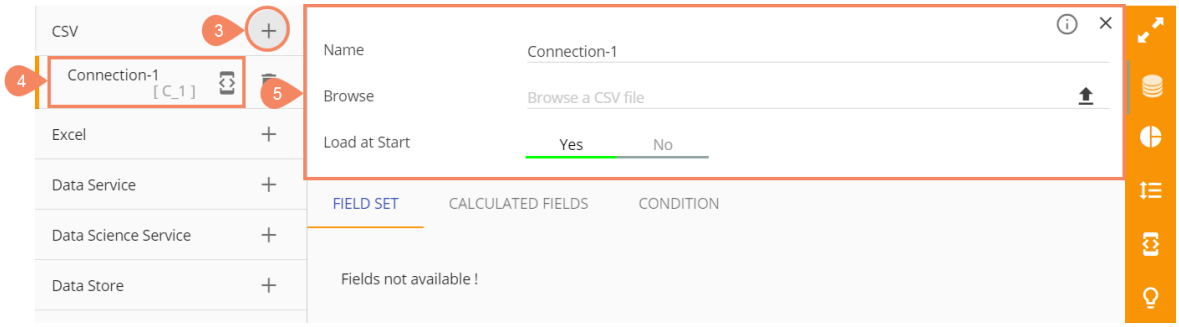
6. Connecting to a Data Source

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



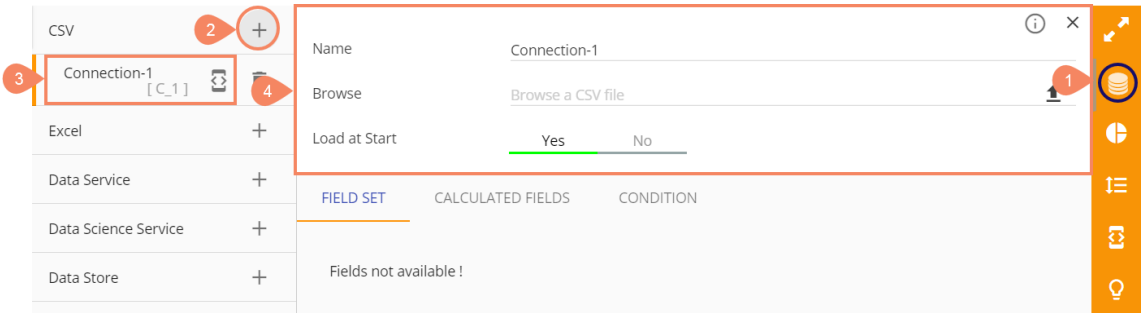
iii) Select a data connection type and click the '**Create New Connection**' icon.
iv) A new connection appears below.
v) Configure the required details to create a data connection.



6.1. Connecting to a CSV File

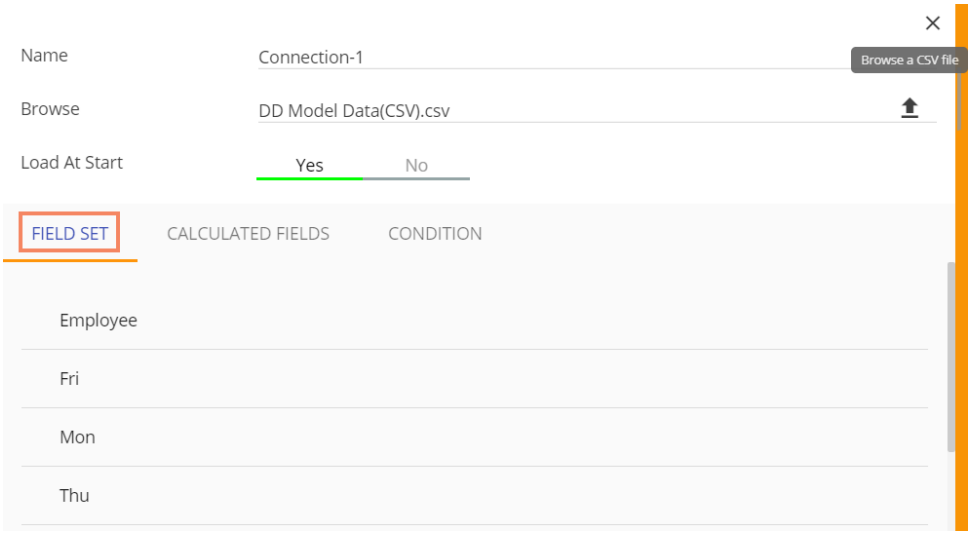
Click the **'Data source'** icon provided to the right side of the canvas, and view the database connectivity options.

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 it into charts.

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

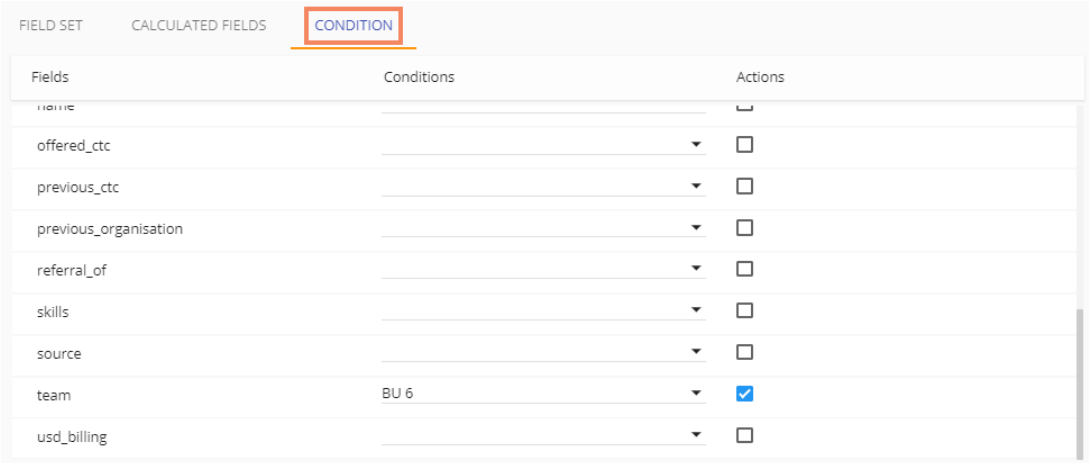


6.1.1. Condition

i) Select the '**CONDITION**' tab.

ii) Provide a condition to be applied as a filter on the selected data by putting a checkmark in the given 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.



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:

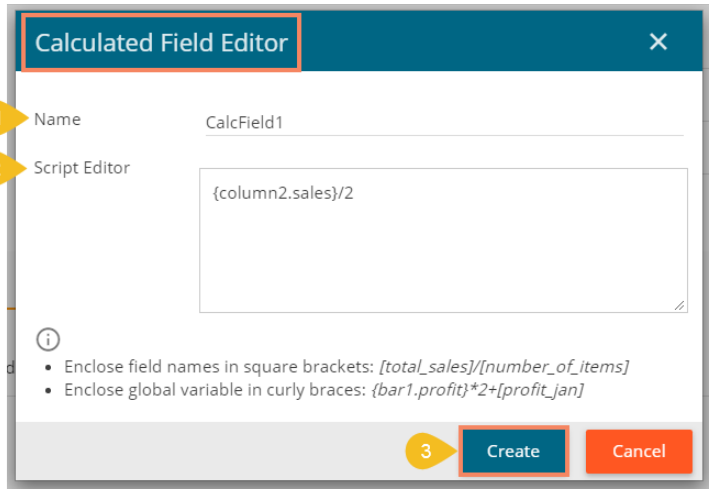
   a. Name: Provide a name for the calculated field

   b. Script Editor: Use the Script Editor space to insert the desired calculation formula using the rule given below.

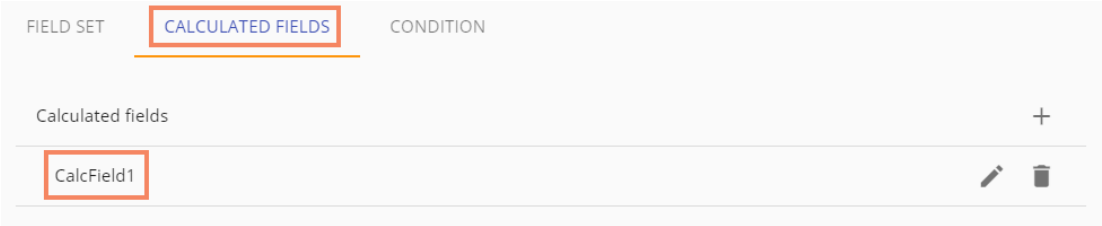
      i. Enclose field names in square brackets: [total_sales]/[number_of_items]

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

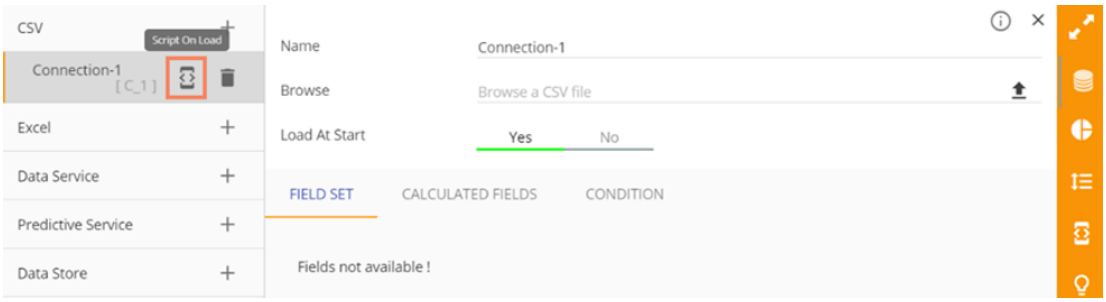
The users can apply their modifications or preferences at the connection level using the Scripting window to get the modified data.

i) Navigate to the Data Connectors page.

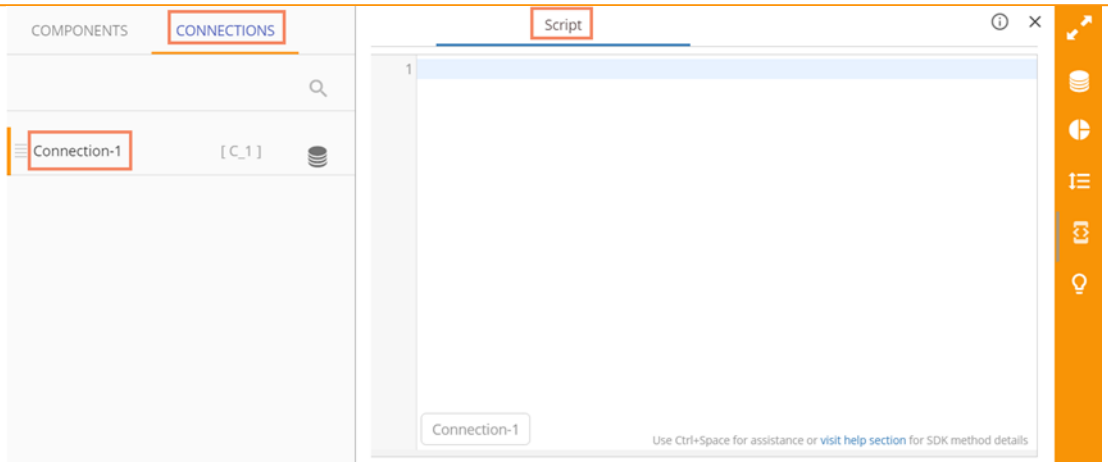
ii) Select a Data Connector type.

iii) Create a new Connection and configure it.

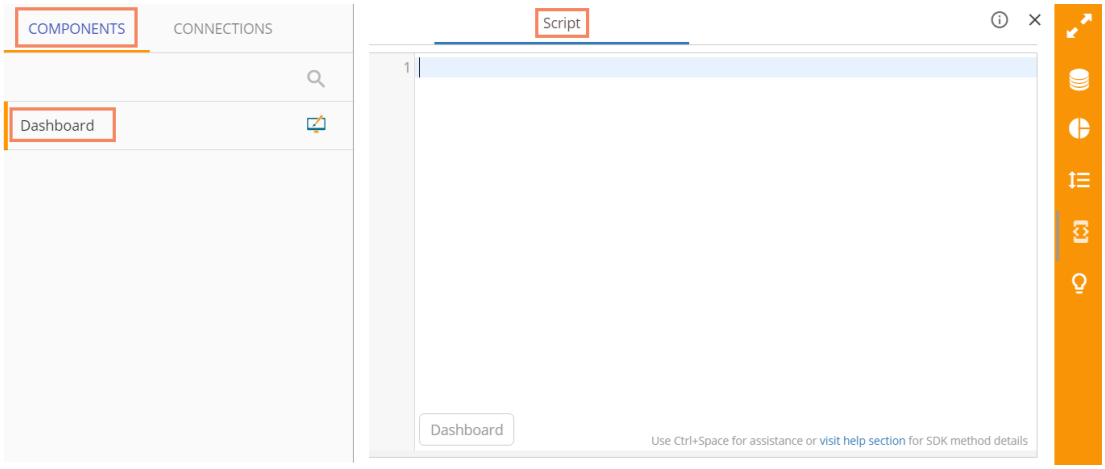
iv) Select the '**Script on Load**' icon provided next to the connection.



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

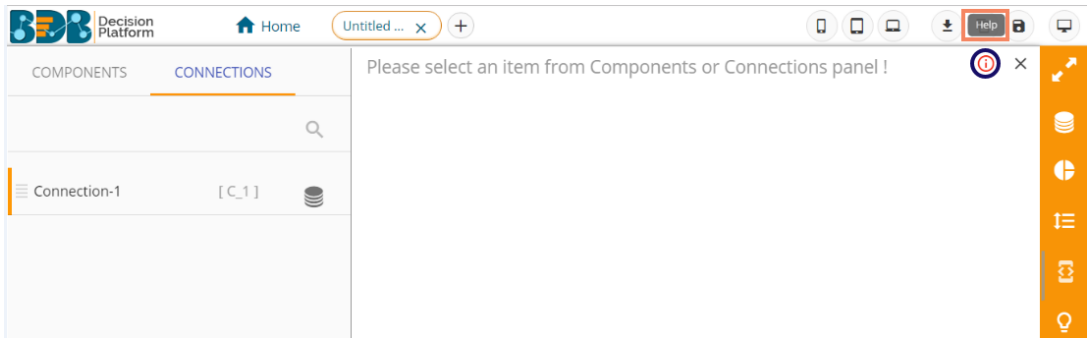


vi) The user can also use a script for the Dashboard, which can be accessed via the '**COMPONENTS**' tab.

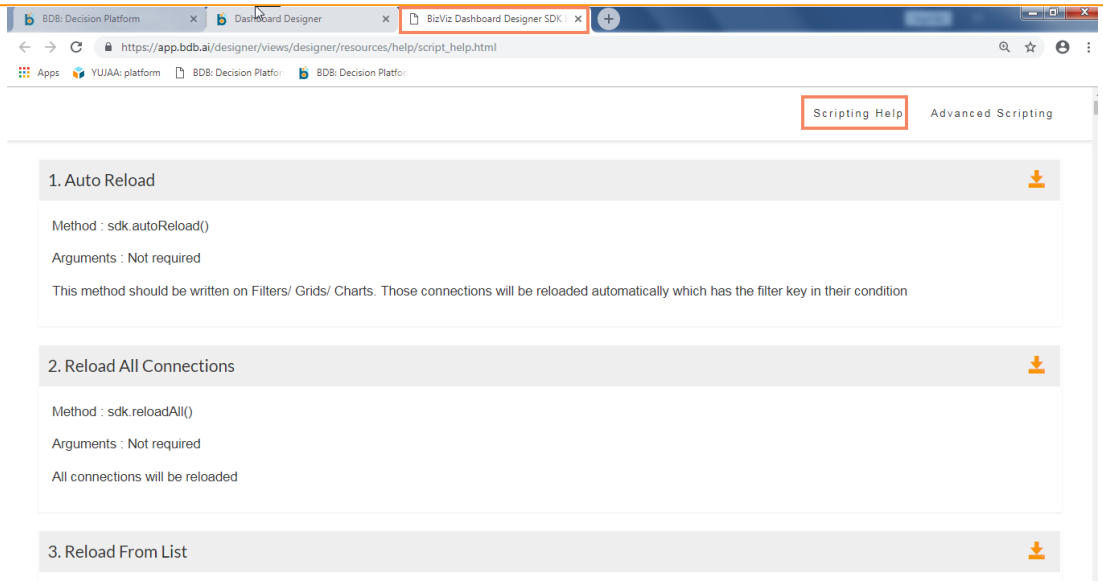


Note:

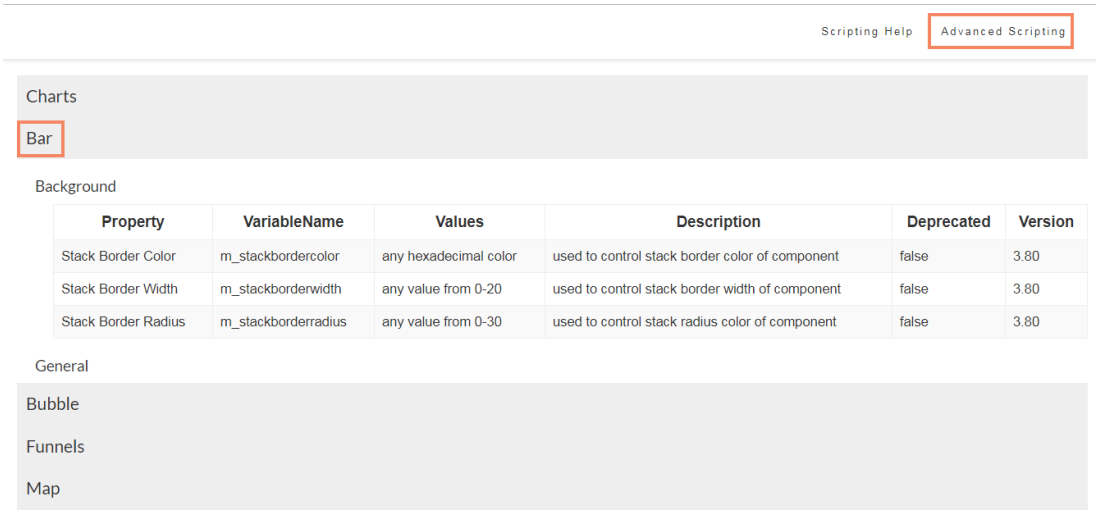
a. Click the '**Help**' icon from the Script on the Load page.



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

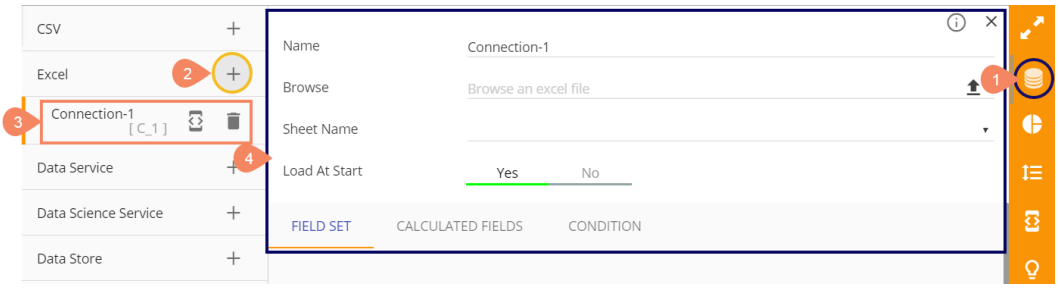


c. Click the '**Advanced Scripting**' option to display the chart-wise advanced scripts.



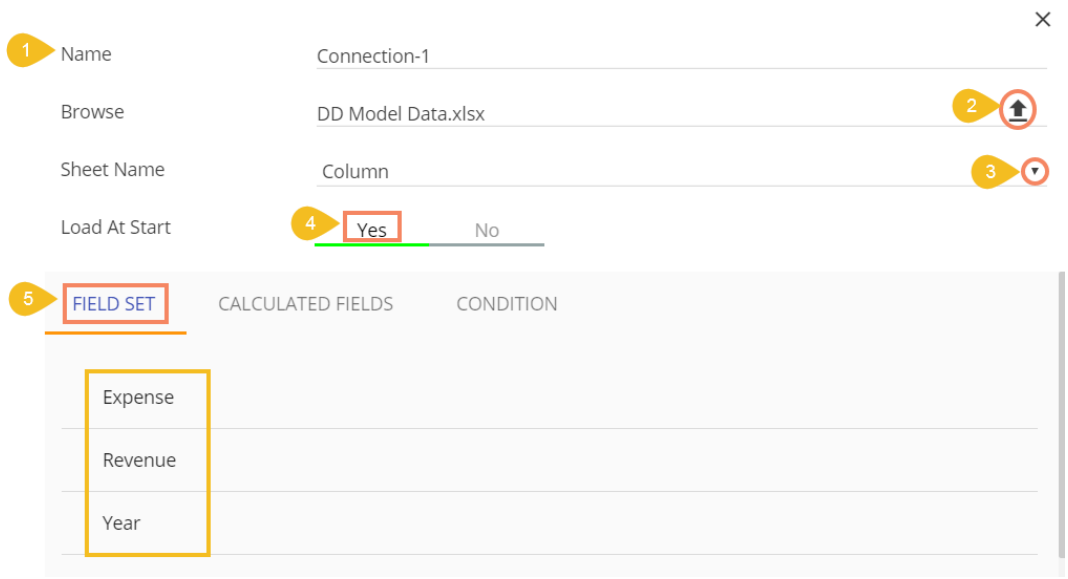
6.2. Connecting to an Excel File

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) The connection-specific details get displayed on the right side of the page.

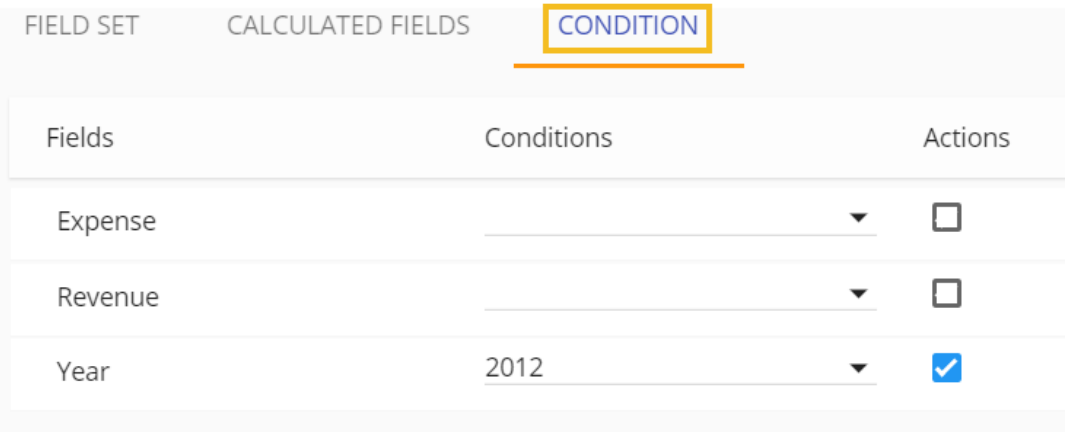


v) Configure the following information:
   a. **Name:** Name the connection.
   b. **Browse:** Click the '**Browse**' icon to browse an Excel file.
   c. **Sheet Name:** Select a specific sheet using the drop-down menu.
   d. **Load at Start:** Enable this option to get the updated data from the data source before loading it into charts.

vi) The '**FIELD SET**' 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 putting checkmarks in the given boxes.
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.



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

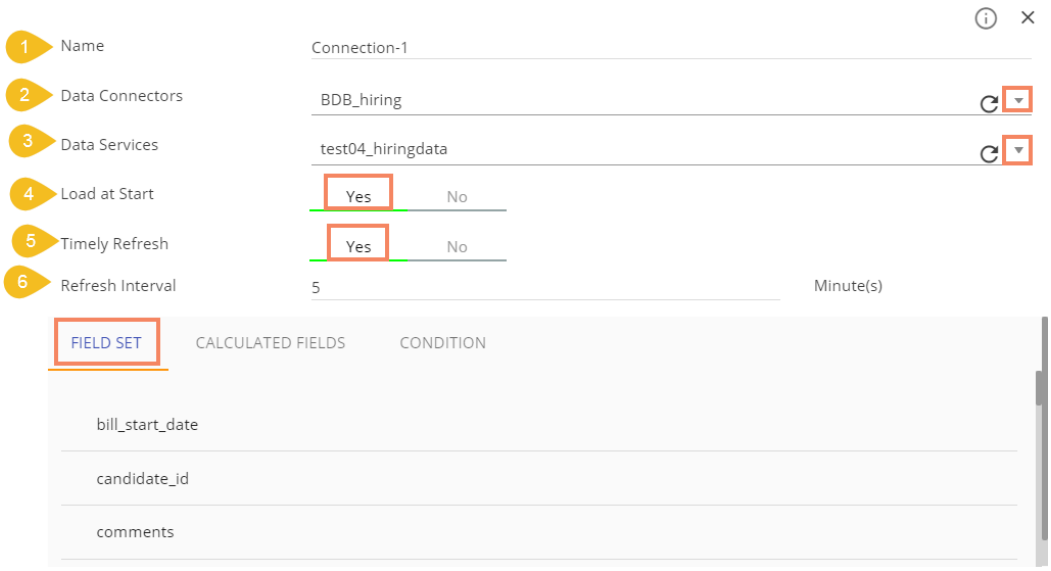
6.3. Connecting to a Data Service

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.

iv) The configurable connection-specific fields display on the right side of the page as explained below:
   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 it 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 Refresh**' the field has been enabled.)

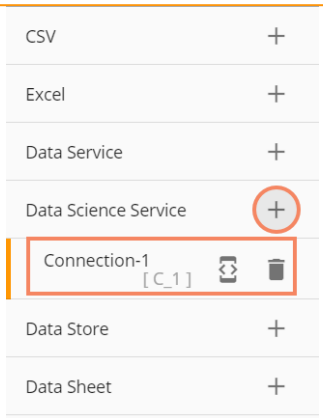
v) The '**FIELD SET**' tab displays all the fields after establishing the data connection.



Note:
   a. Click the '**Reload Data Sources**' icon to reload the existing data connectors.
   b. Click the '**Refresh Service**' icon to refresh all the available data services.
   c. The users can filter the targeted data set using the '**CONDITION**' option.

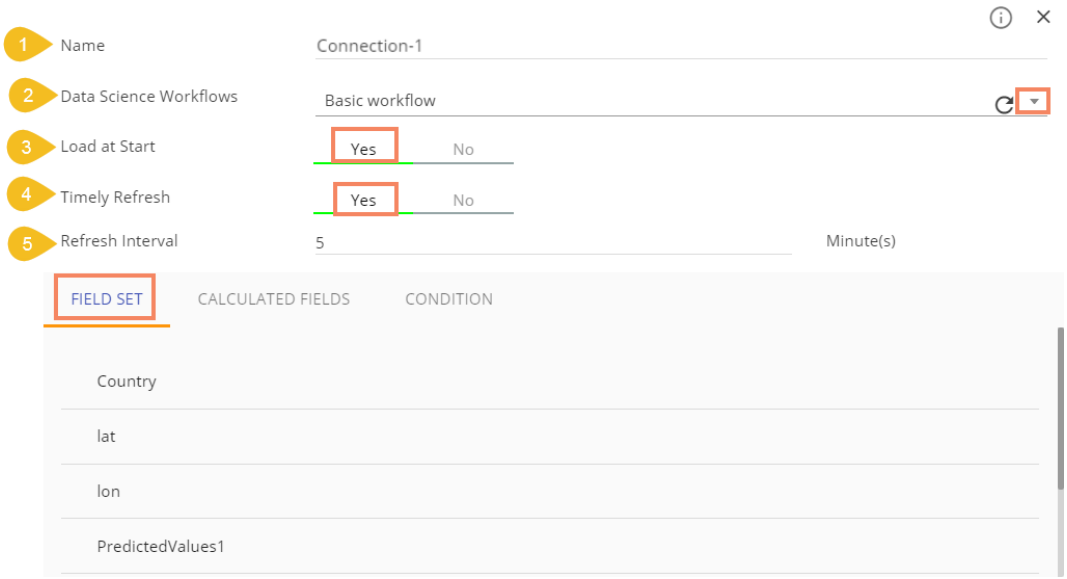
6.4. Connecting to a Data Science Service

i) Navigate to the Data Connector page by clicking the '**Data Connectors**' icon .
ii) Click the '**Create New Connection**' + icon provided next to the '**Data Science Service**' connector.
iii) A new connection gets created under the Data Science Service connector type.



iv) The configurable connection-specific fields display on the right side of the page as explained below:
   a. **Name:** Name the connection.
   b. **Data Science Workflows:** Select a deployed Data Science 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 it into charts.
   d. **Timely Refresh:** Enable this option to get the refreshed data.
   e. **Refresh Interval:** Set the time for refresh interval. (This field appears when the '**Timely Refreshed**' field has been enabled.)

v) The '**FIELD SET**' tab displays all the fields after establishing the data connection.



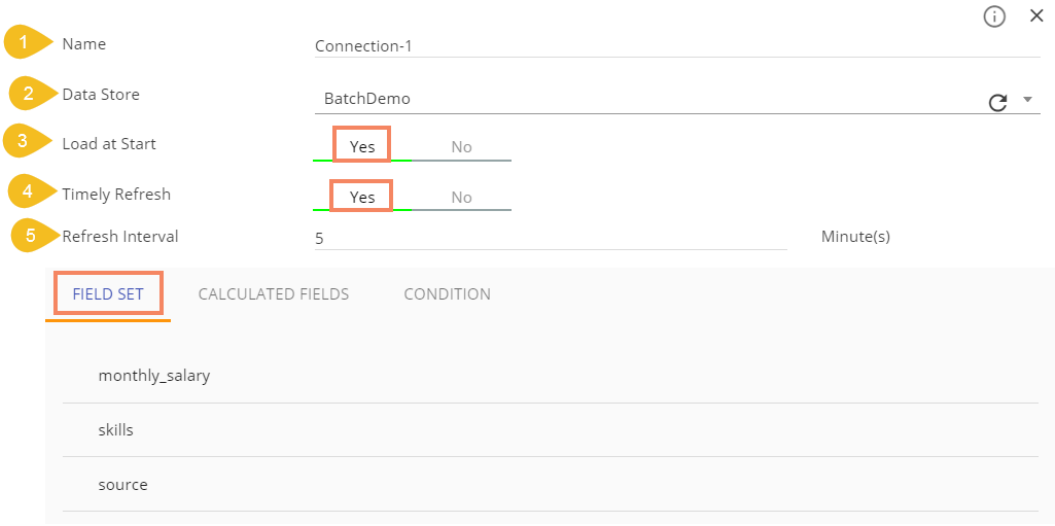
Note:
   a. Click the '**Refresh Workflows**' icon to refresh the Data Science Workflows.
   b. The users can filter the targeted data set using the '**CONDITION**' option.

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 created under the Data Store connector type.

iv) The configurable connection-specific fields display on the right side of the page as explained below:
   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 it 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.)

v) The '**FIELD SET**' tab displays all the fields after establishing the data connection.



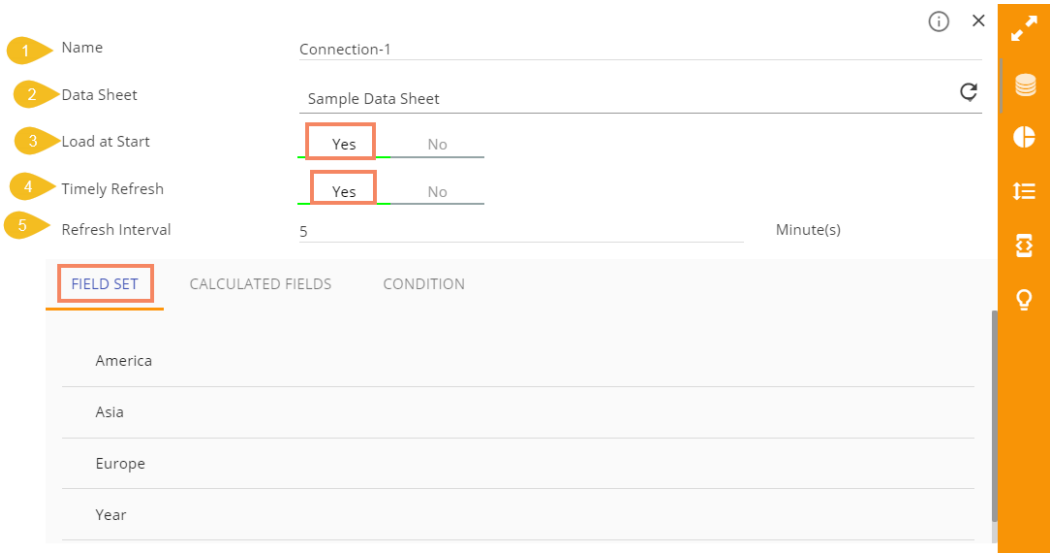
Note:
   a. Click the '**Refresh Data Stores**' icon to refresh the selected Data Store data connection.
   b. The users can filter the targeted data set using the '**CONDITION**' option.

6.6. Connecting to a Data Sheet

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 Sheet**' connector.
iii) A new connection gets created under the Data Store connector type.

iv) The configurable connection-specific fields display on the right side of the page as explained below:
   a. **Name:** Provide a name for the connection.
   b. **Data Sheet:** Select a Data Sheet 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 it 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.)

v) The '**FIELD SET**' tab displays all the fields after establishing the data connection.

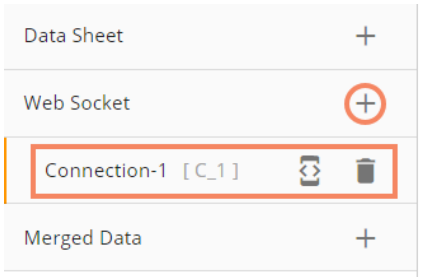


6.7. Connecting to a Websocket

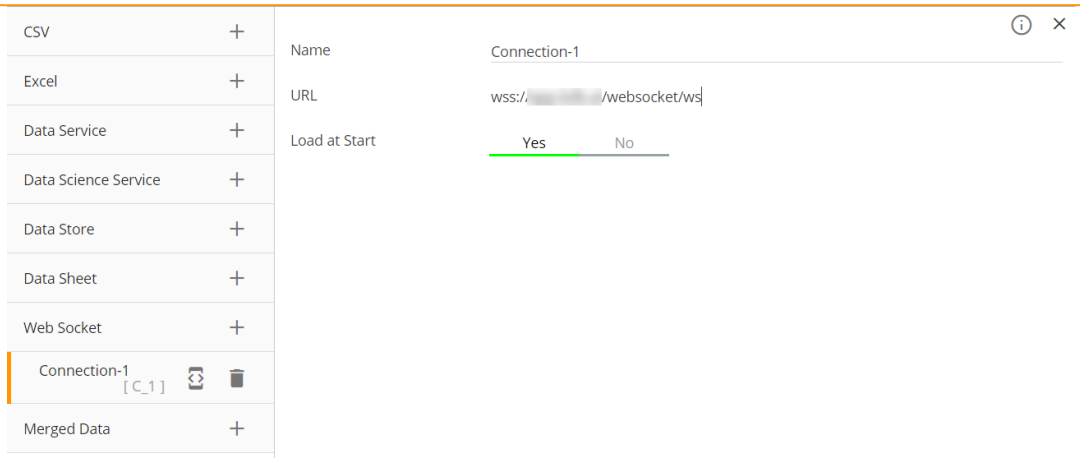
i) Click the '**Data Connectors**' icon.

ii) Click the '**Create New Connection**' + icon provided next to the '**Websocket**' connector.

iii) A new connection gets created under the Web Socket connector type.



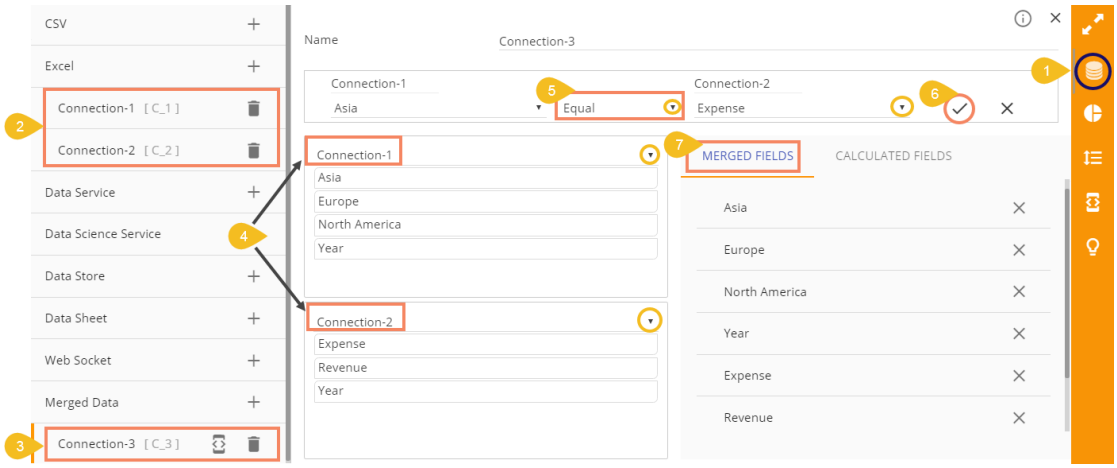
iv) The configurable connection-specific fields display on the right side of the page as explained below:
   a. **Name:** Provide a name for the connection
   b. **URL:** Enter a URL link
   c. **Load at Start**: Enable this option to get up-to-date data / pull the updated data from the data source before loading it into charts.



v) The websocket connection gets established.

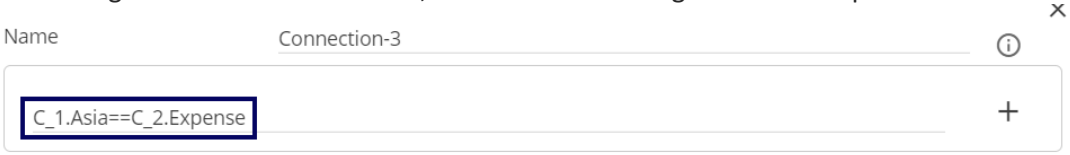
6.8. Connecting to a Merged Data

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.



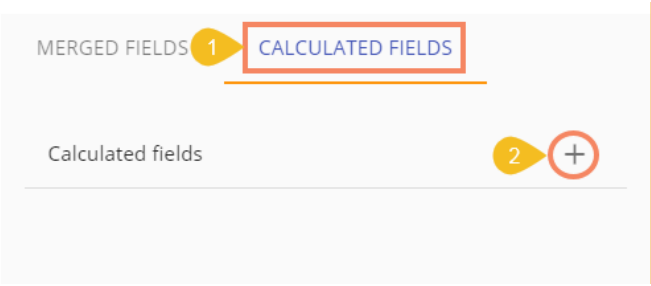
Note:

a. The 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.

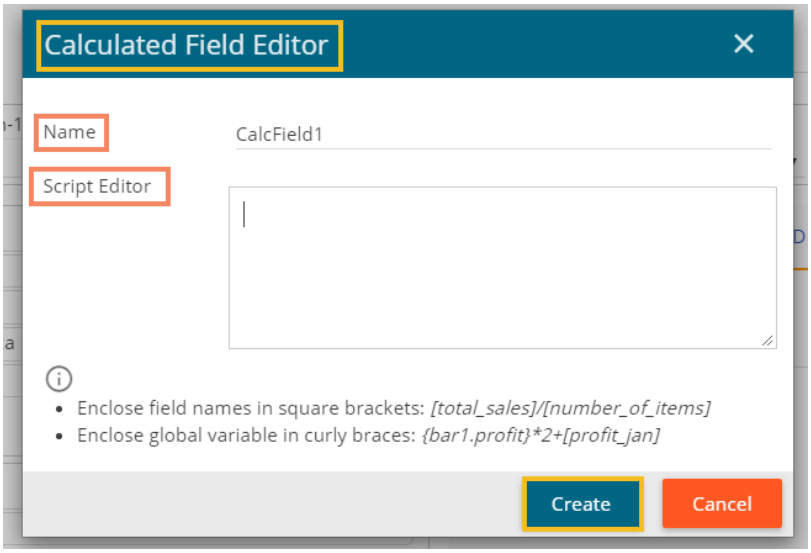


c. Trigger a script to produce some action on the connection part using the '**Script on Load**' icon.
d. Select the CALCULATED FIELDS tab to access Calculated Field Editor and add the calculated fields.
   1. Click the 'CALCULATED FIELDS' tab.

2. Click the ‘Add’ icon.



3. The Calculated Field Editor window opens.
   a. Provide a title for the calculated field
   b. Insert calculation formula inside the Script Editor space.
   c. Click the ‘**Create**’ option.

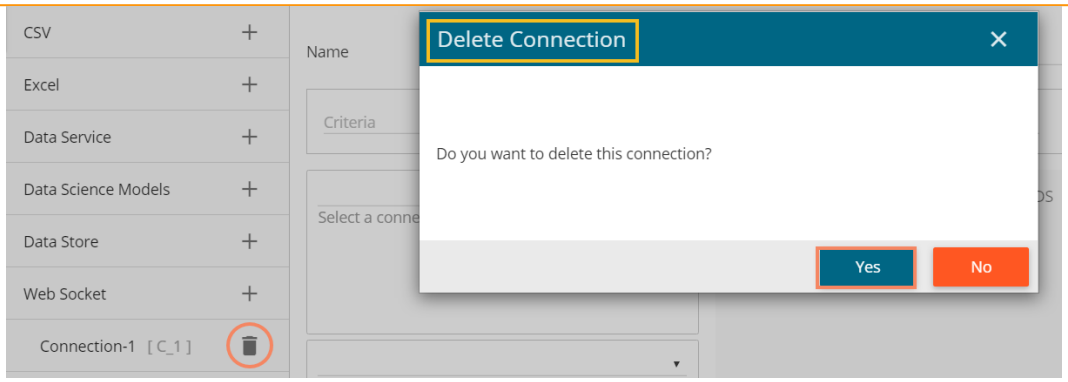


   d. The newly created Calculated field gets added under the CALCULATED FIELDS tab.

6.9. 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.

6.10. Connecting Data Set Connection to a Dashboard Component

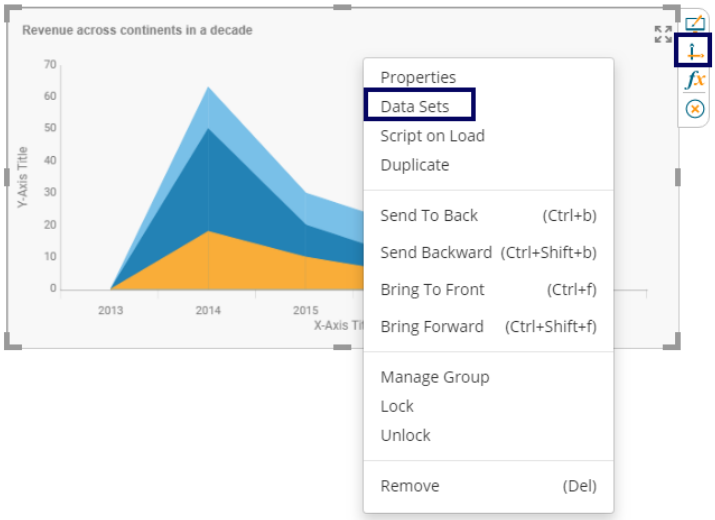
i) Navigate to the Dashboard Canvas.

ii) Select and drag a charting 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**.

6.10.1. Dataset Palette

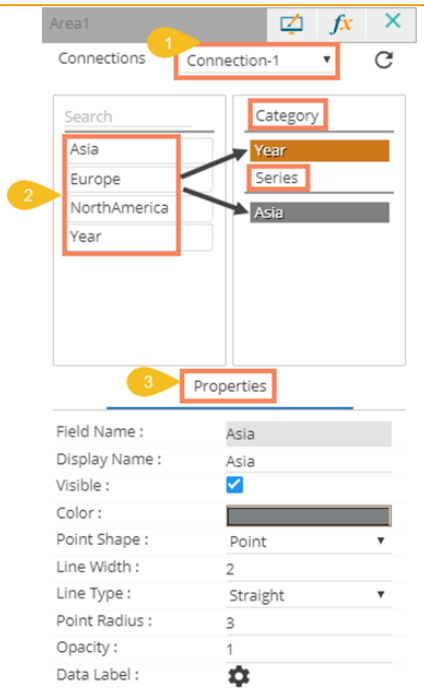
The Dataset Palette is the window that can be used to configure the dataset fields of a component. Each field has several properties that can be set using this palette.

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.



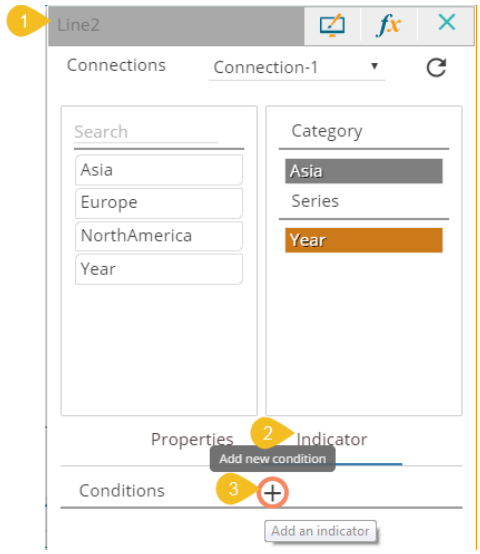
6.10.2. Indicator Tab

The Dataset Palette displays the 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 the Indicator tab.

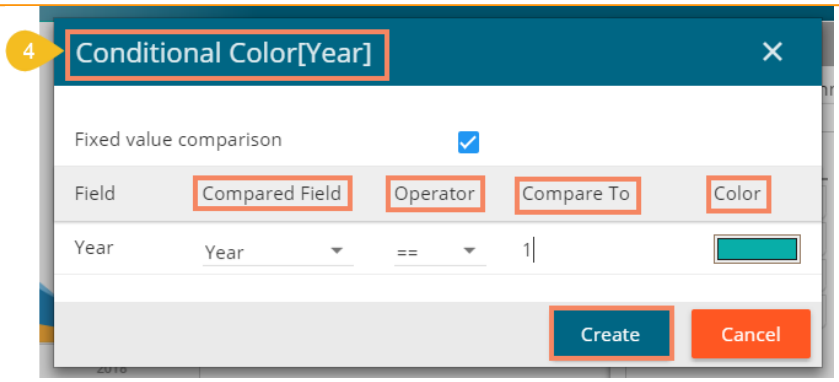
ii) Navigate to the Indicator tab.

iii) Click the '**Add new Condition**' icon.

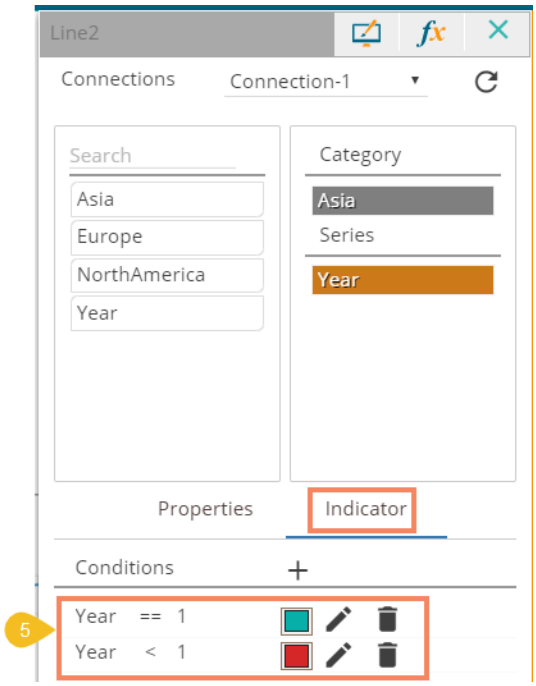


iv) The Conditional Color window appears.

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.

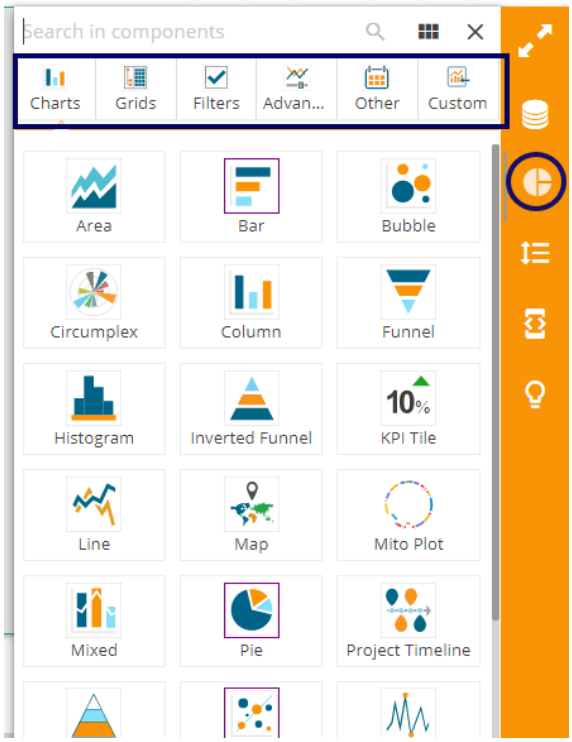


7. Components

The components are the elements like charts, tables, gauges, metrics which are used to create a dashboard. The 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.

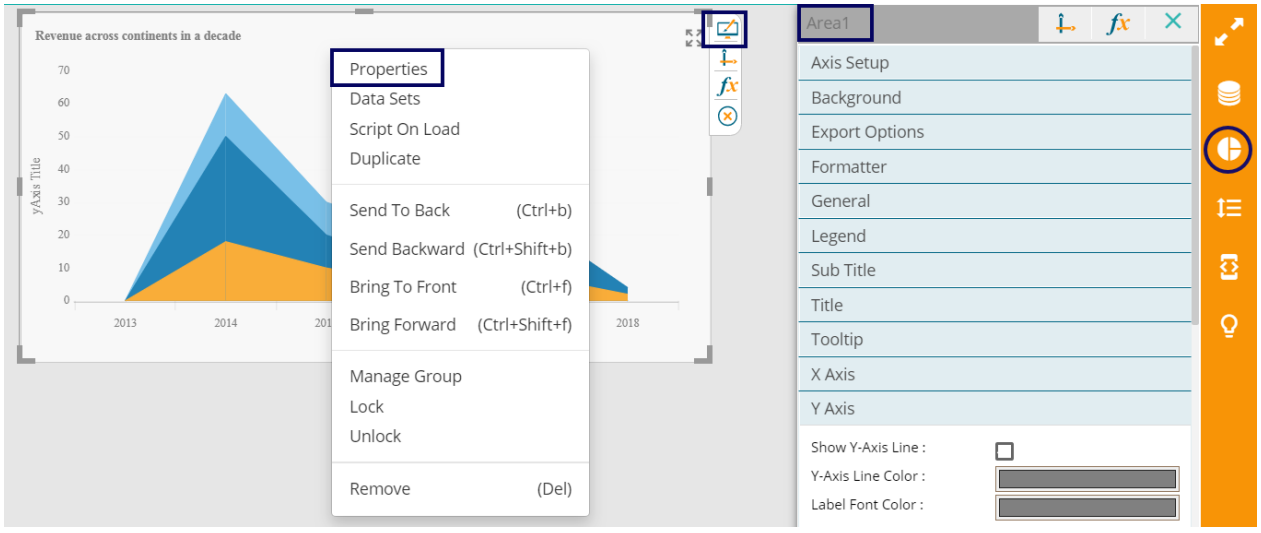
i) Navigate to the Designer Canvas.
ii) Click the '**Component Library**' icon from the right edge of the window.
iii) Various categories of the available charting components get displayed (The 'Charts' category gets selected by default).



iv) Select and drag a component on the canvas.

v) Click the '**Properties**' icon
OR
Use Right-click on a component and click the '**Properties**' option.

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



Note: Explore the Component Gallery section of the BDB Website to know more about each charting component. Use link https://bdb.ai/component-gallery to open the Component Gallery.

The users can decide the best pick to visualize their specific business data by going through the below given link as well.

https://08009ad7bf1979094b0b-3488c35d3ab28aac7529e703b5435d94.ssl.cf1.rackcdn.com/BDB%20Documentation%20-%203.0/BDB%20Webite/Dashboard%20Desinger%20Charting%20Components.pdf

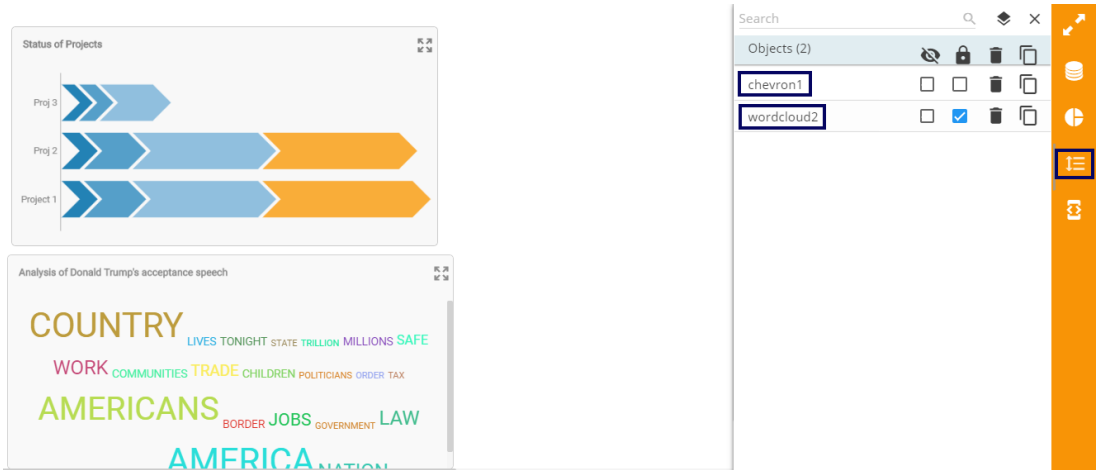
8. Dashboard Objects

Every component in the dashboard is considered as an object. Object browsers have properties that 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 on 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

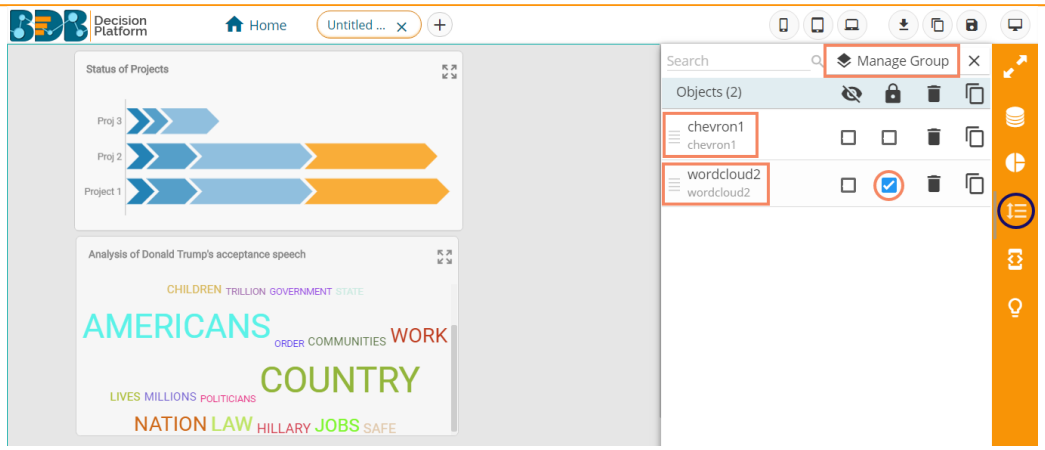
i) **Hide All** : By clicking on this icon, all the components which are present in the dashboard will be hidden. Users can hide the individual components by enabling the checkbox provided next to the name of the component.

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:

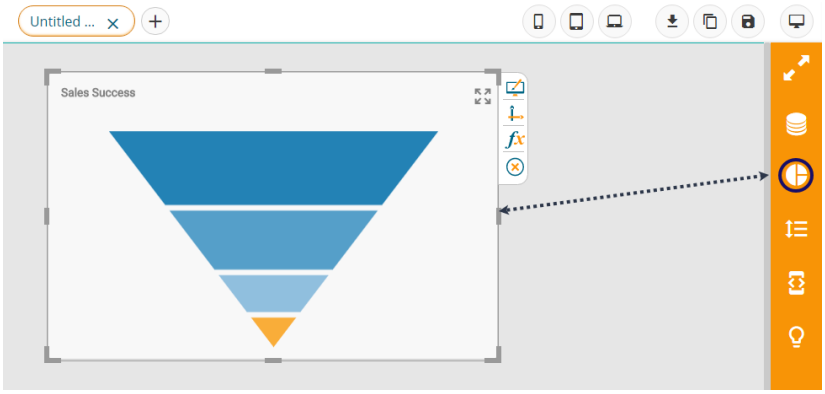
a) Passing Default Values (Manual Filter)
b) Performing Dynamic Filtering (through SDK methods)

9.1. Passing Default Values

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

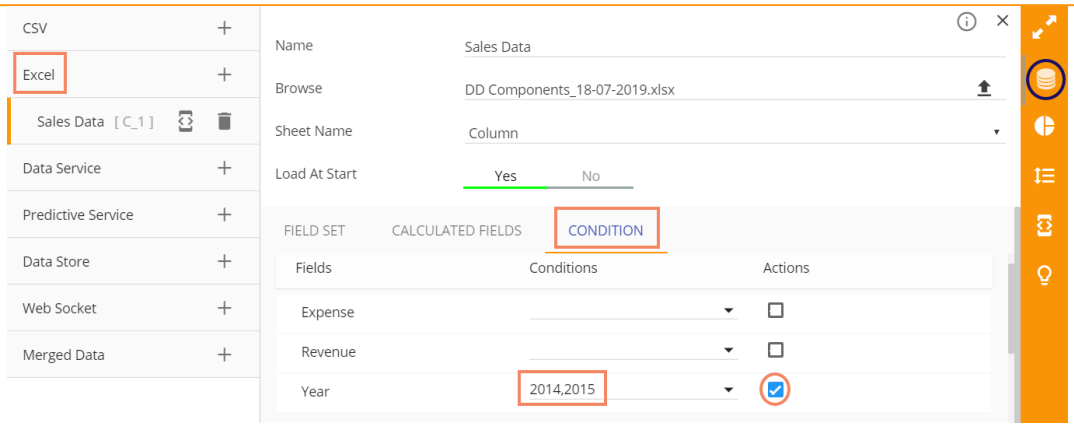
E.g., Assume that we have Sales data from some organizations. In this example, we would pass only data of **the years 2014 and 2015**. In the given scenario, we need to perform the following steps:

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 the 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.

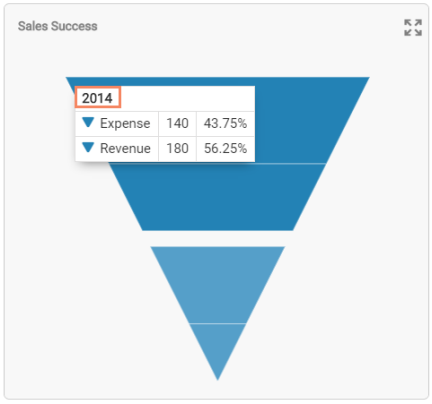


Fig-1

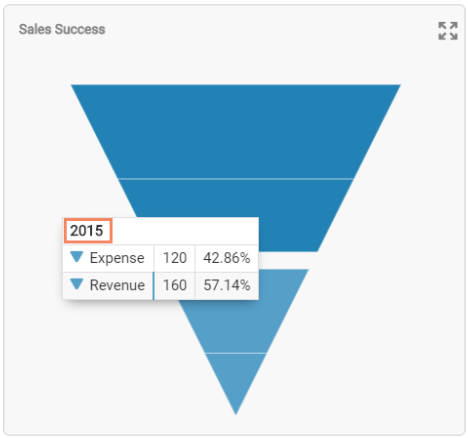


Fig-2

9.2. Performing Dynamic Filtering

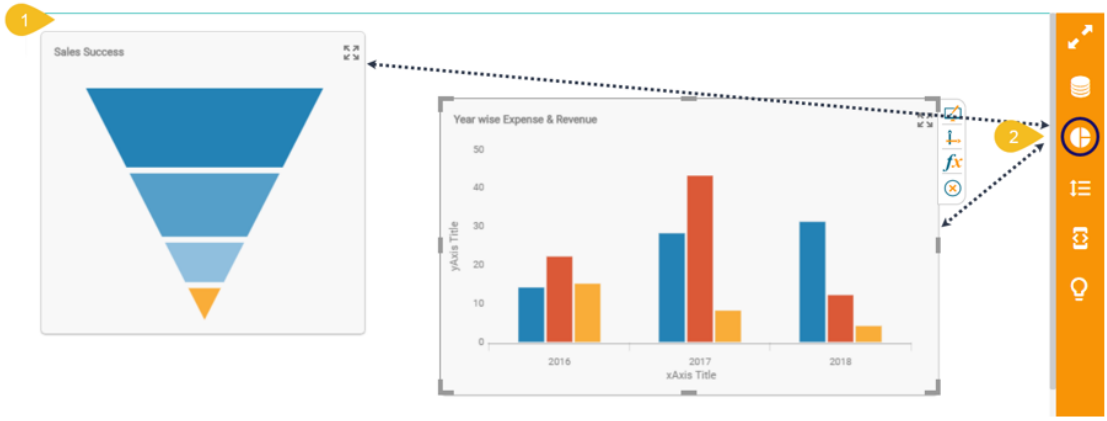
This section explains how to perform dynamic filtering using filters and charts. Every component has some attributes and values which can be seen in the **'Component Attributes'** window. The user can pass the

values of one component into another component to achieve dynamic filtering functionality.

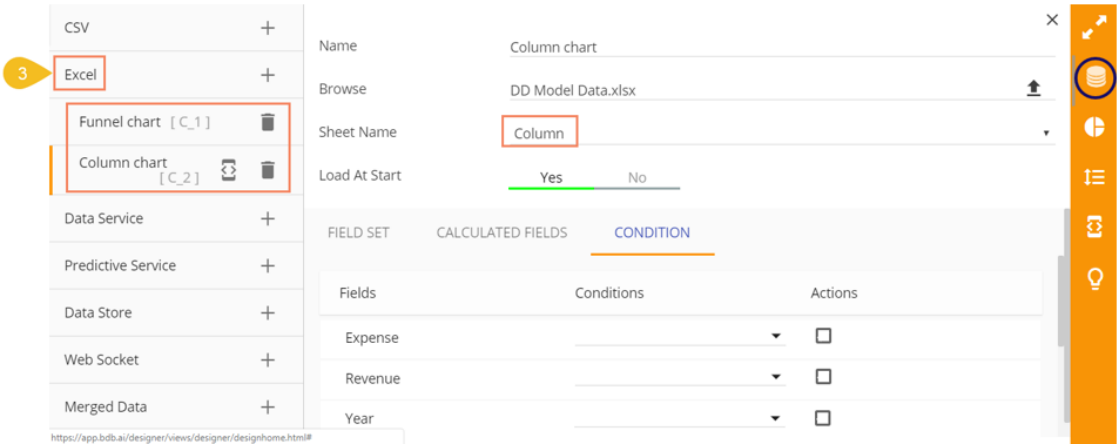
Scenario: Performing dynamic filtering using a Funnel chart to Column chart

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).



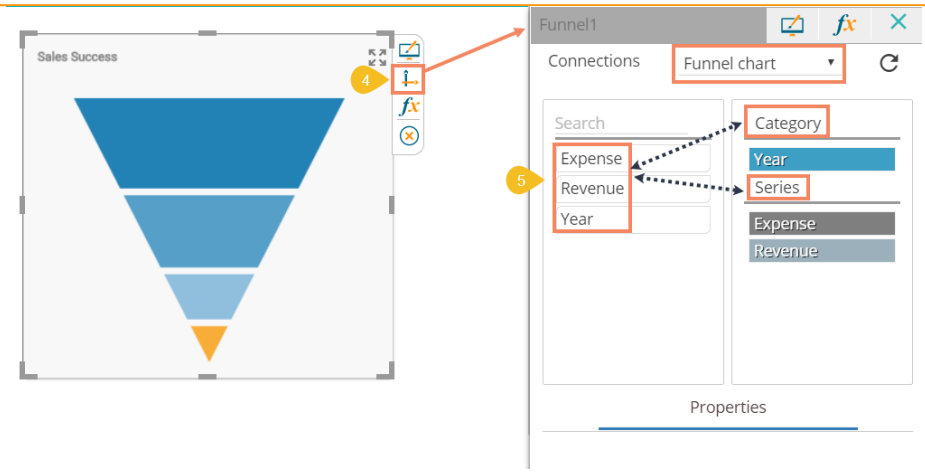
iii) Connect an Excel data source of sales data. (**Refer to section 7.2. for creating a data source connection using Excel File**).
Note: Use a single data set for both the connections so that they contain the same data while using the data drill.



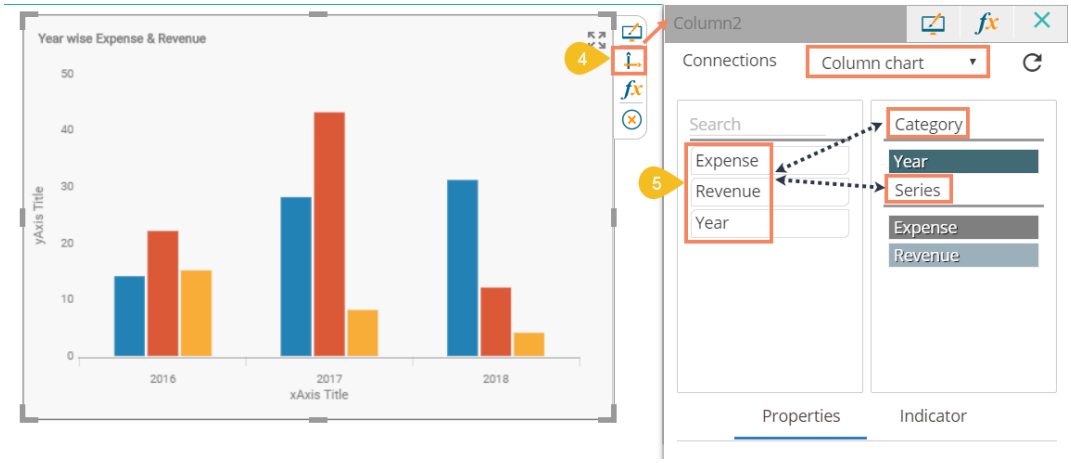
iv) Connect the created data connectors to the respective charting components using the Data Set icon.

v) Configure the required Dataset Palette fields, as shown below:

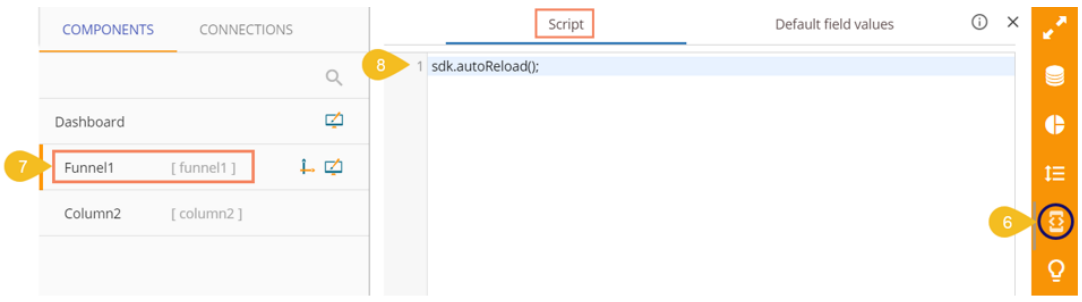
a. Do the required configurations for the Funnel chart-



b. Do the required configuration for the Column chart-



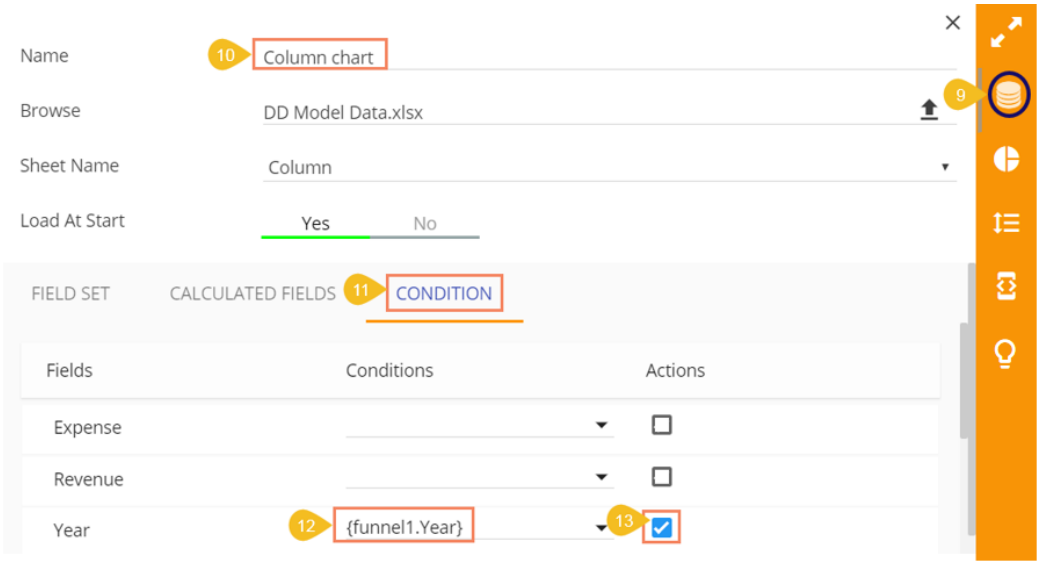
vi) Click the **'Component Variables and Script'** icon provided to the right side of the canvas.
vii) Select the Funnel component.
viii) Follow the below mentioned steps to write the function name:
   a. Type '**sdk.**' in the given space.
   b. Use '**Ctrl+Space**' keys.
   c. A function list appears.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



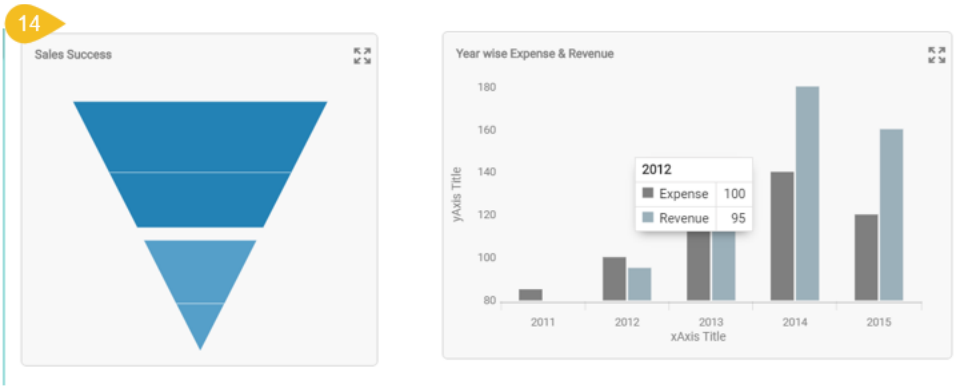
ix) Select the '**Data Source**' icon
x) Select the data connection details displayed for the Column chart on the right side of the window.
xi) Click the **'Condition'** option.

xii) Select the field name using which filtering will be performed (E.g., In this case, using the **'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)

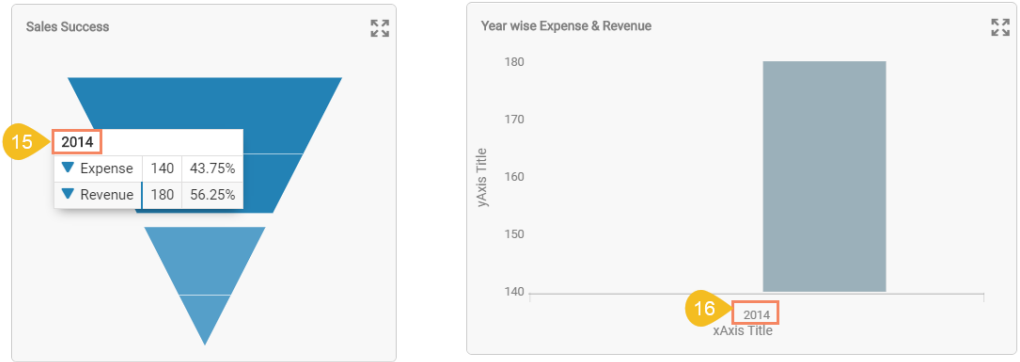


xiv) Click the '**Preview**' icon to open the preview mode for the concerned components.



xv) Select a specific year value using the Pie-chart.

xvi) The sales information for the selected year displays via the Column chart.

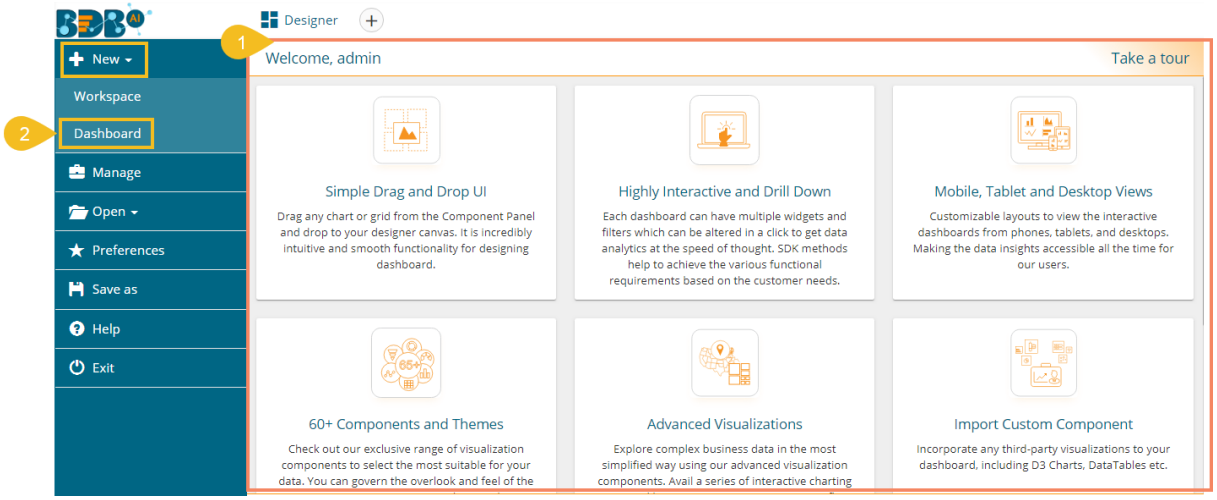


10. Scripting Window

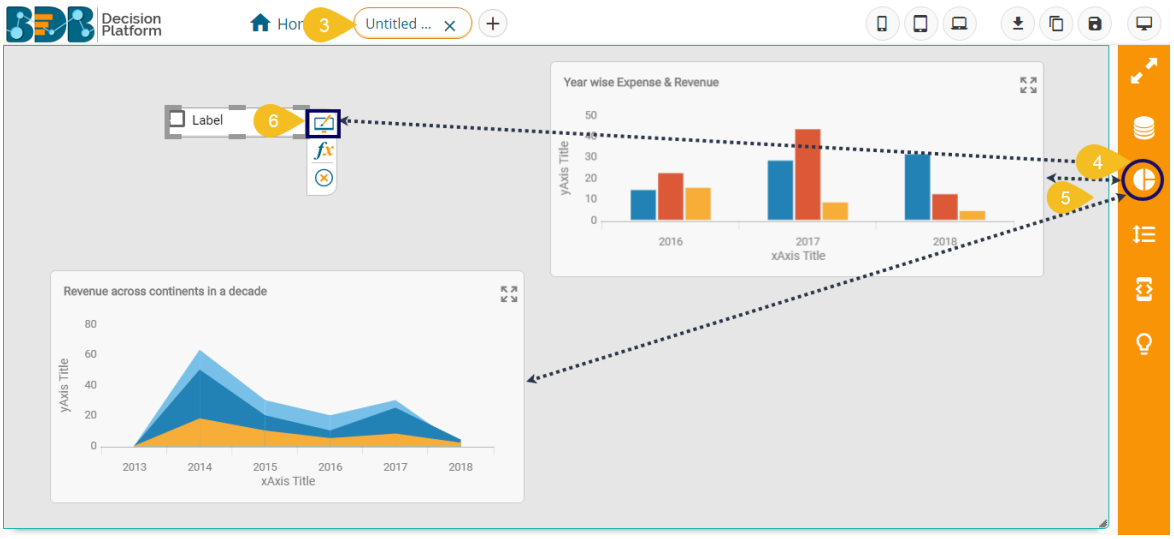
BDB offers a scripting mechanism in the Designer plugin to help the users experience the next level of customization in dashboard creation. BDB offers script support at the component level to display the intended UI actions and at the data connection level to apply data related back-end changes. The 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 that, when enabled displays a column chart, and when disabled, shows an area chart. This concept is called **Dynamic Visibility**.

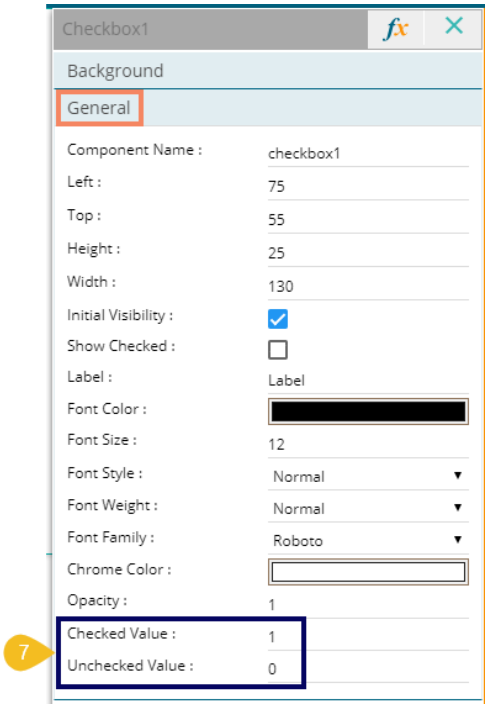
i) Navigate to the Designer homepage.
ii) Select the '**Dashboard**' option using the '**New**' drop-down menu to create a new dashboard.
OR
Click the '**Designer**' option given on the header of the homepage.



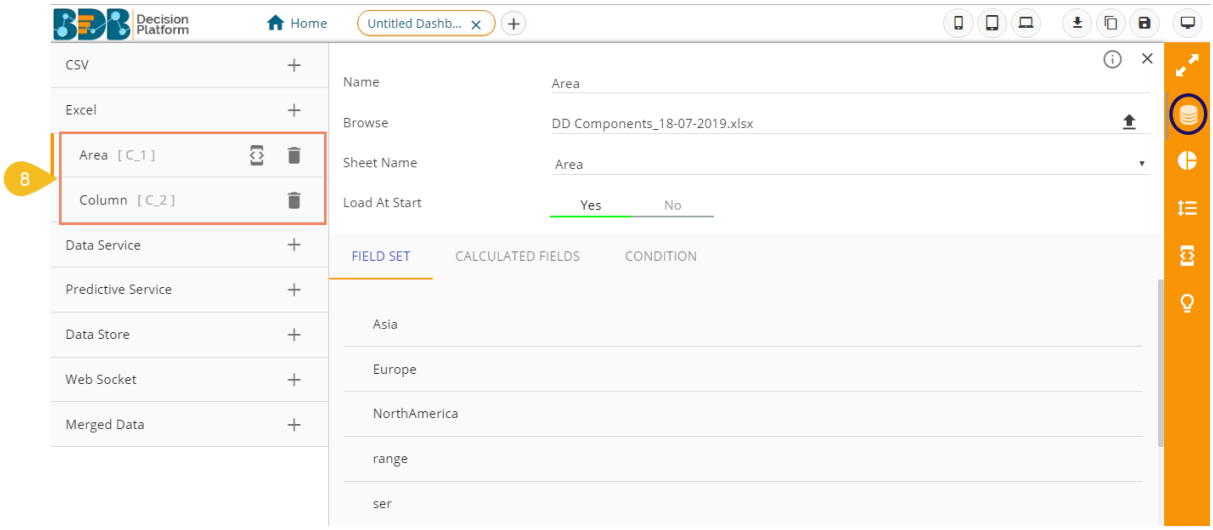
iii) The dashboard canvass opens for the Untitled Dashboard.
iv) Click the '**Component Library**' icon.
v) Drag and drop the '**Checkbox**,' '**Column Chart**', and '**Area Chart**' components into the canvas.
vi) Click on the '**Properties**' icon next to the Checkbox component.



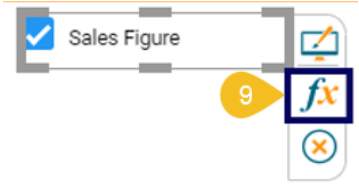
vii) Set **Checked Value to '1'** and **Unchecked Value to '0'** (as shown below) using the '**General**' properties tab of the Checkbox component.



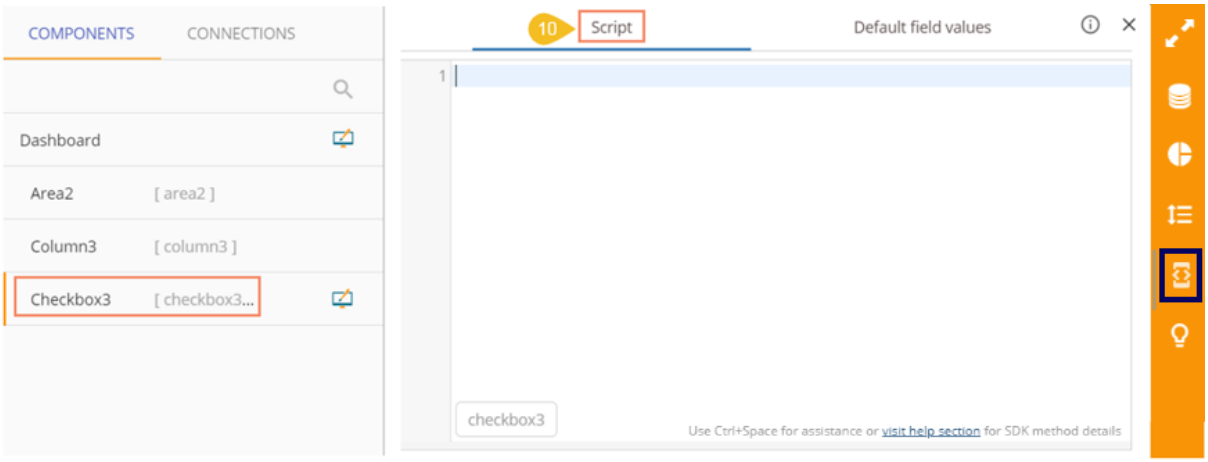
viii) Create data connections for the Column chart and Area chart. (**Ref. Connecting Data Set Connection to a Dashboard Component**).



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

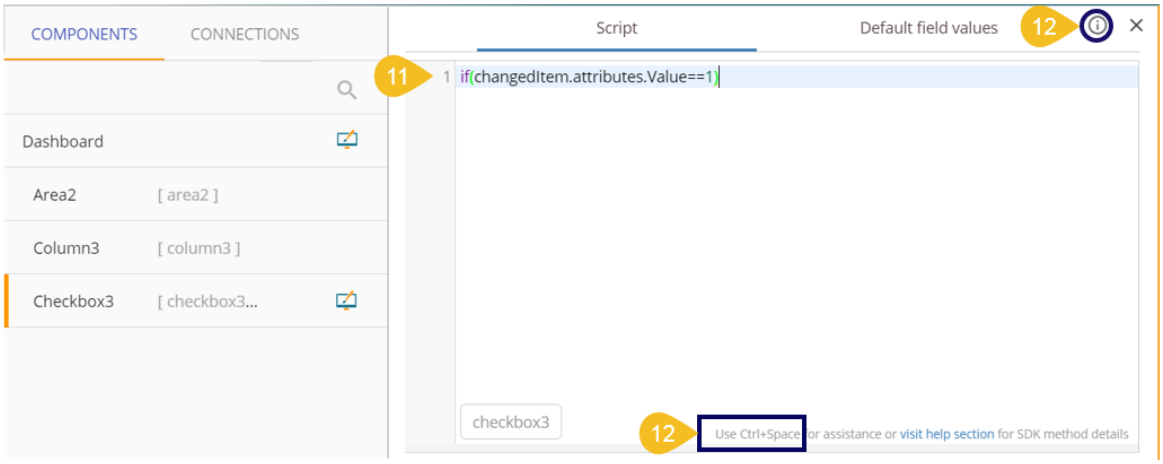


x) The script window for the Checkbox component opens.

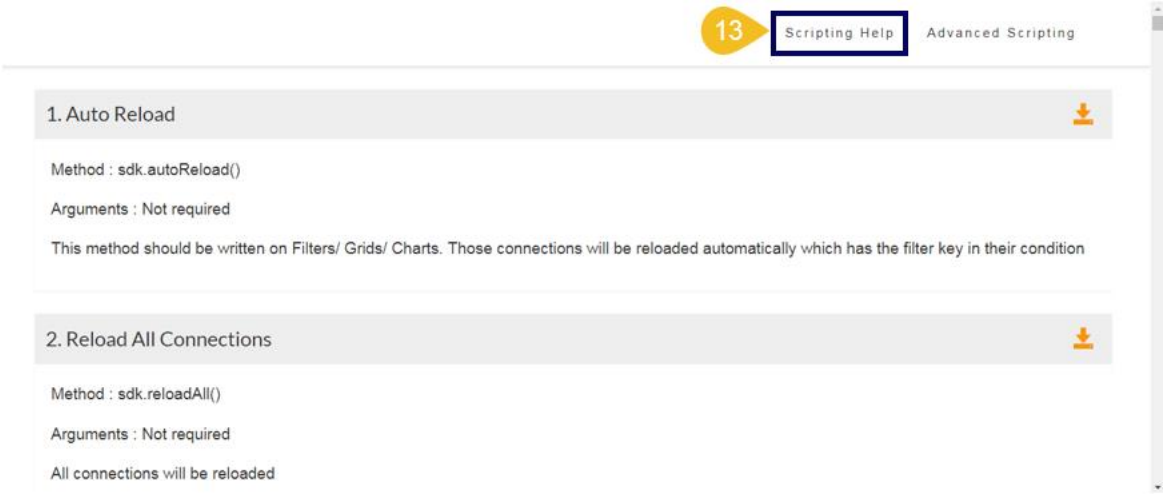


xi) Write the relevant script for the action mentioned above, as explained in the following steps:

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)
c. Either click the '**Help**' icon ⓘ or use '**Ctrl+Space'** keys to get the assistance in writing the script.

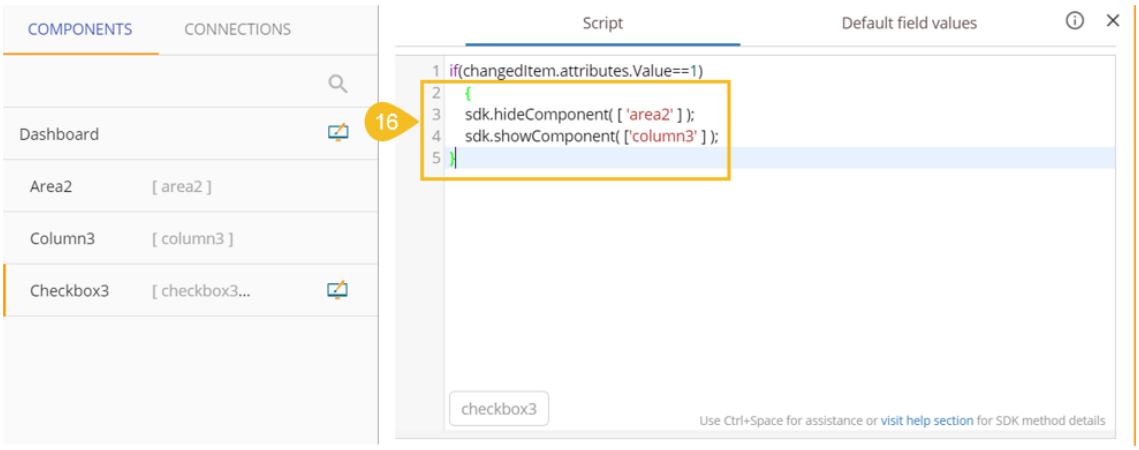


d. The '**Designer Scripting Help**' window opens.

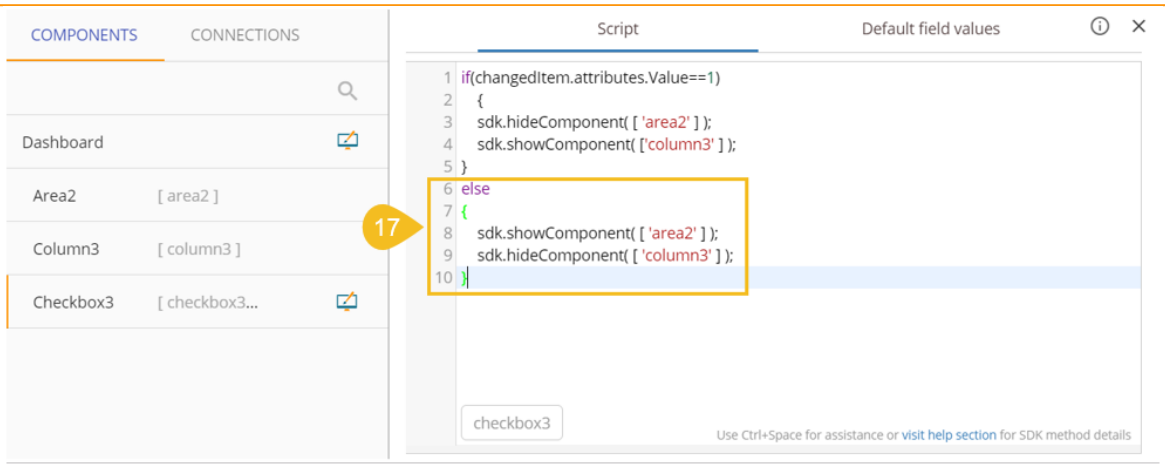


e. Select the '**Show and Hide**' function as per the requirement from the Designer Scripting Help window.

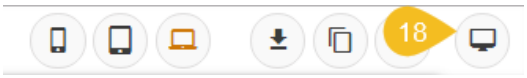
f. If the '**Value == 1**' (in other words, if the Checkbox is enabled) the Column chart should be displayed. For this to occur,
   i. Place the '**Hide Component**' and '**Show Component**' functions under the '**if**' function.
   ii. Pass Area chart value to the '**Hide Component**' function.
   iii.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



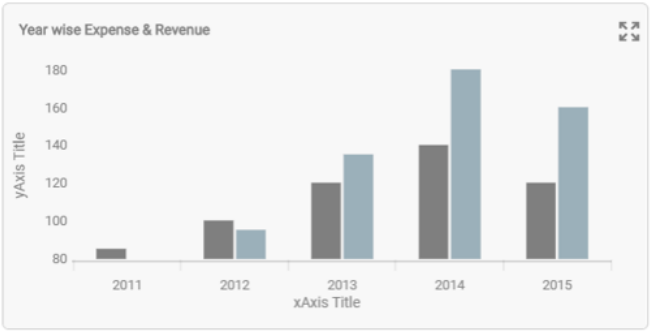
g. If the '**Value == 0**' (in other words, if the checkbox is disabled), we need to do the reverse of the function that we used earlier. So that when users uncheck Check Box, the '**Area chart**' gets displayed and the '**Column chart**' remains hidden.
   To accomplish this, users need to write the highlighted portion of the script:



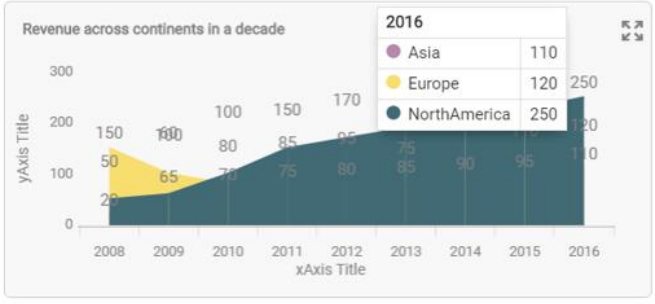
xii) After entering the above script successfully, click the '**Preview**' icon to view the results.



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



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



11. Managing Options for a Dashboard

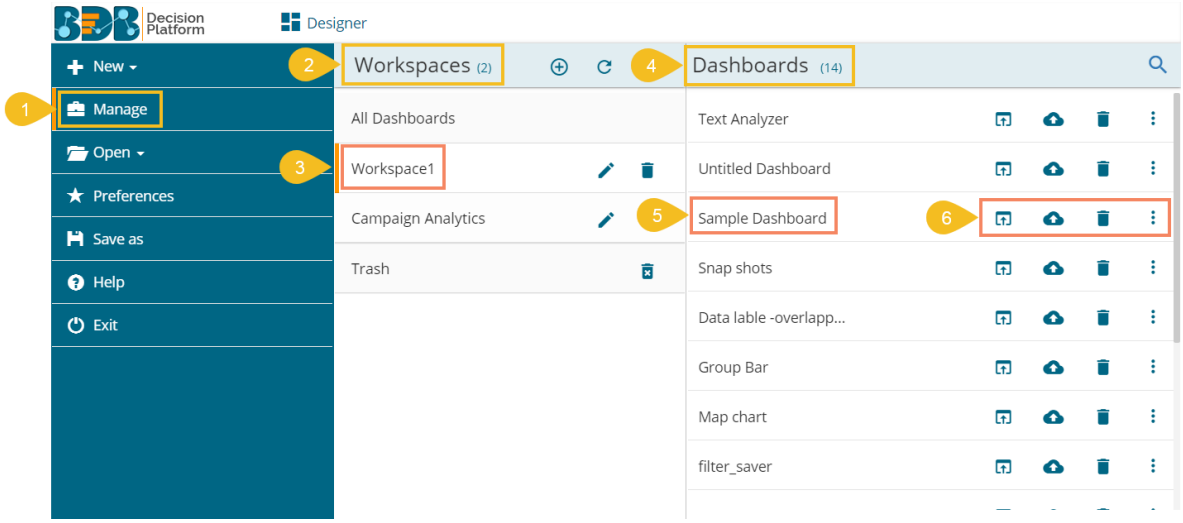
Manage and share your work with others. This section explains how to edit, save, and publish the dashboards created by users.

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:

a. The users can also use the '**Manage**' option to manage the created workspaces.

b. Click the '**Rename**' icon provided next to a workspace to rename the workspace.

c. Click the '**Trash**' icon to remove a workspace from the list.

11.1. Opening a Dashboard

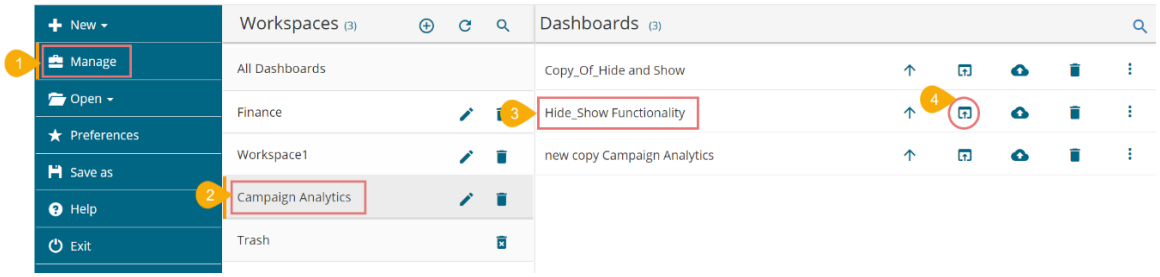
The users can open the desired dashboard into the designer workspace once they have created and saved it to a workspace.

i) Click the '**Manage**' option on the Designer homepage.

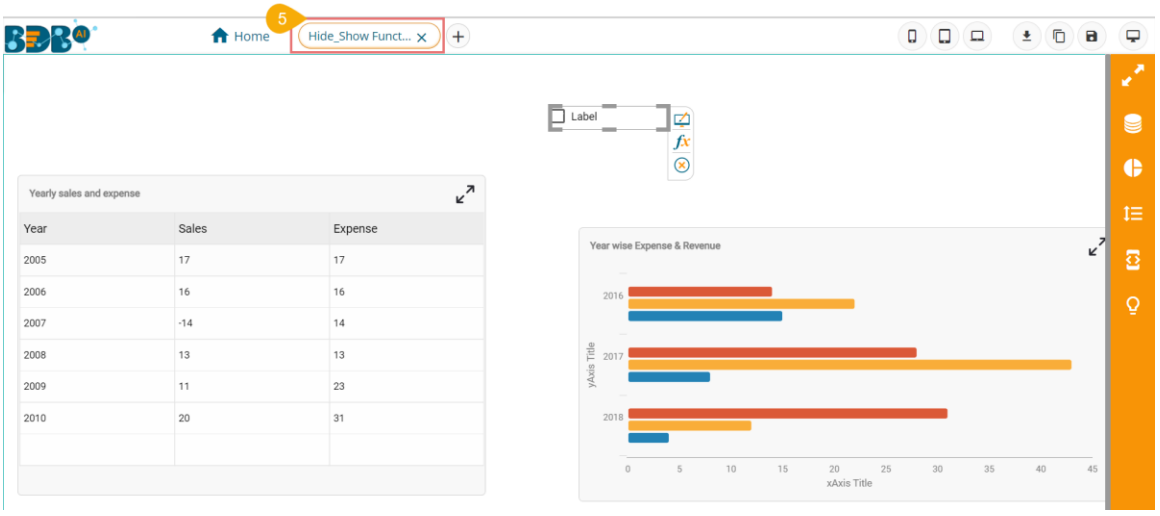
ii) Select and click on a workspace from the list of Workspaces.

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.

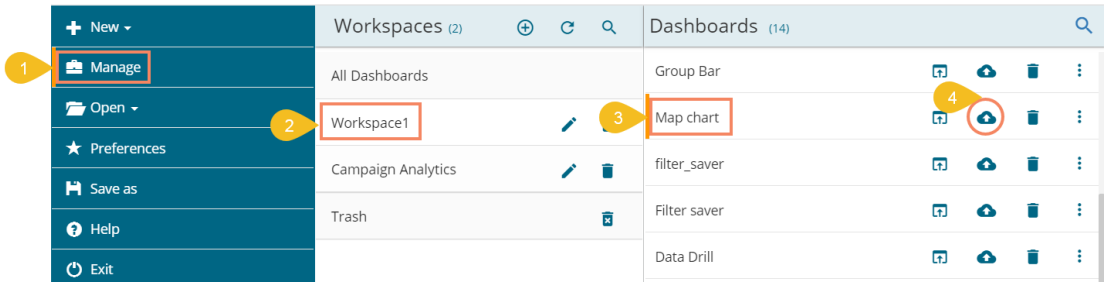


Note: The users can also open a dashboard in the designer canvas by using double clicks on the dashboard name from the list of saved dashboards.

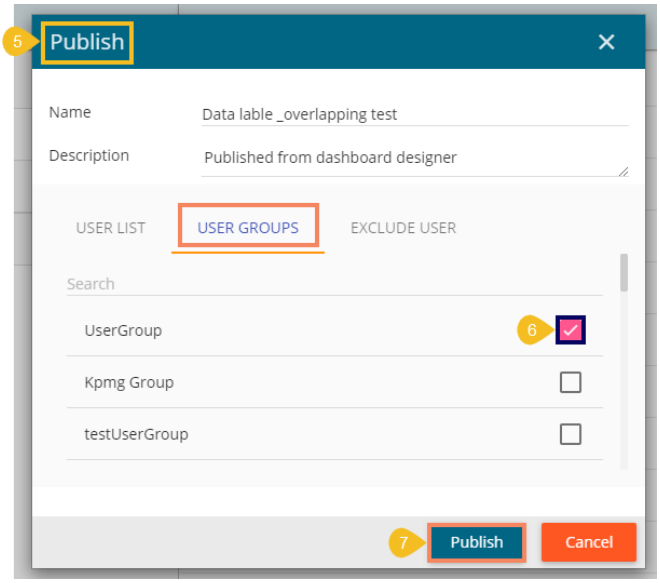
11.2. Publishing a Dashboard

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

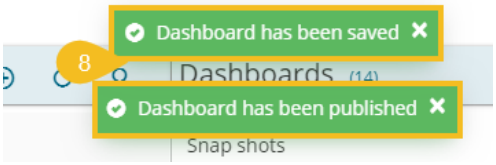
i) Click the '**Manage**' option on the Designer homepage.
ii) Select and click on a workspace from the list of Workspaces.
iii) Select a Dashboard from the list of the saved dashboards under the selected workspace.
iv) Click the '**Publish to Portal**' icon.



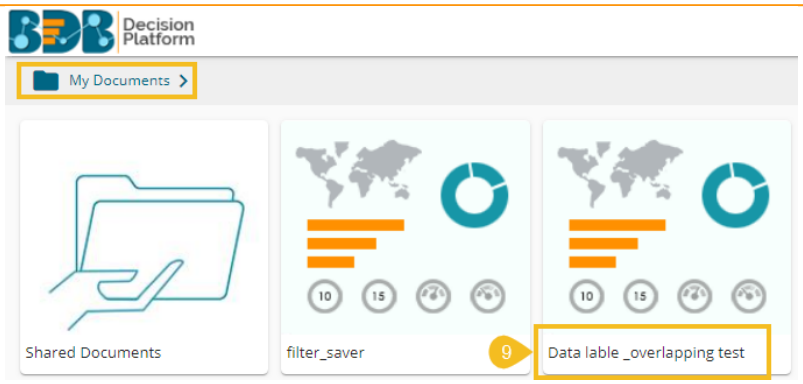
v) The '**Publish**' dialog box appears to assure the action with the dashboard name and description.
vi) The user needs to specify a user or user group using the following options:
   i. USER LIST: To select a user or multiple users by using a checkmark in the box
   ii. USER GROUPS: To select a user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



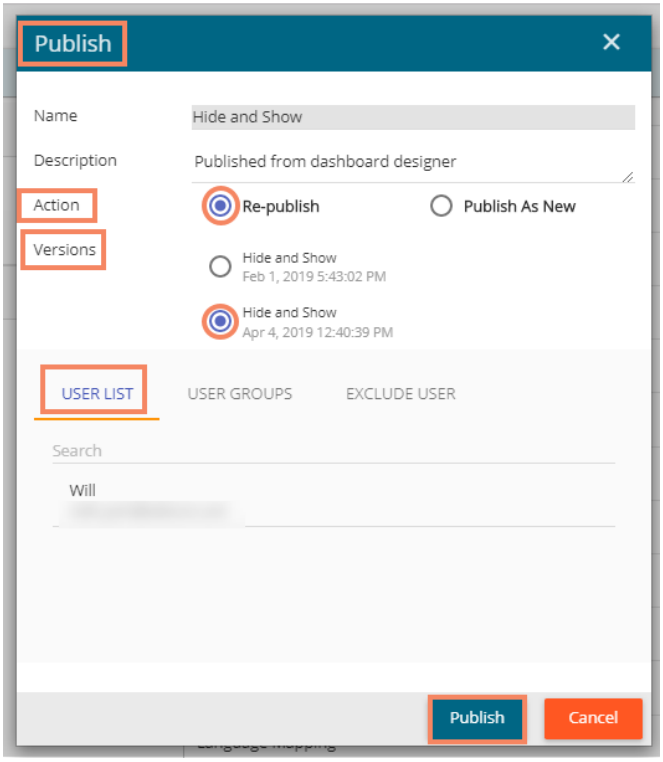
ix) The selected dashboard gets published at the desired place.



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.

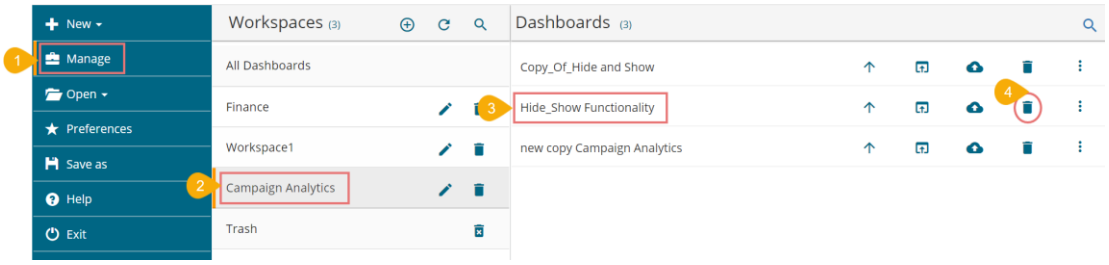
ii) Click the '**Publish**' option to complete the action.



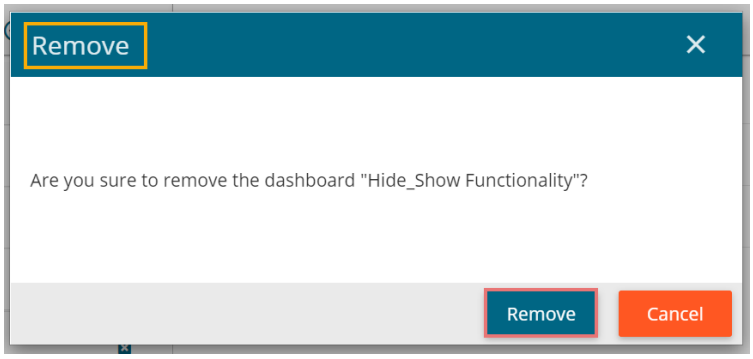
11.3. Deleting a Dashboard

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

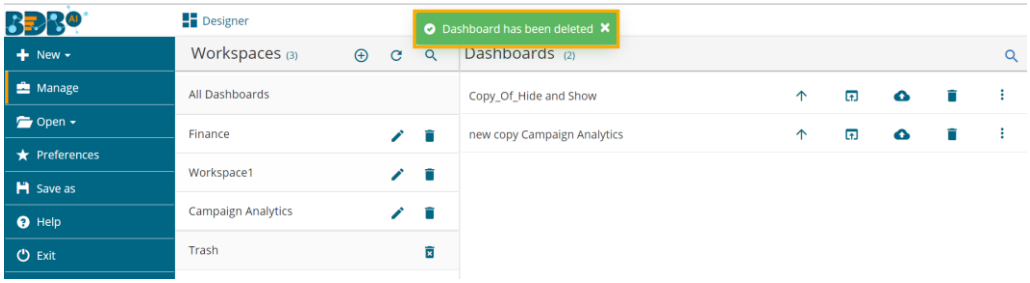
i) Click the '**Manage**' option on the Dashboard Designer home page.
ii) Select and click on a workspace from the list of all the Workspaces.
iii) Select a Dashboard from the list of all the created dashboards under the selected workspace.
iv) Click the '**Delete**' icon.



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



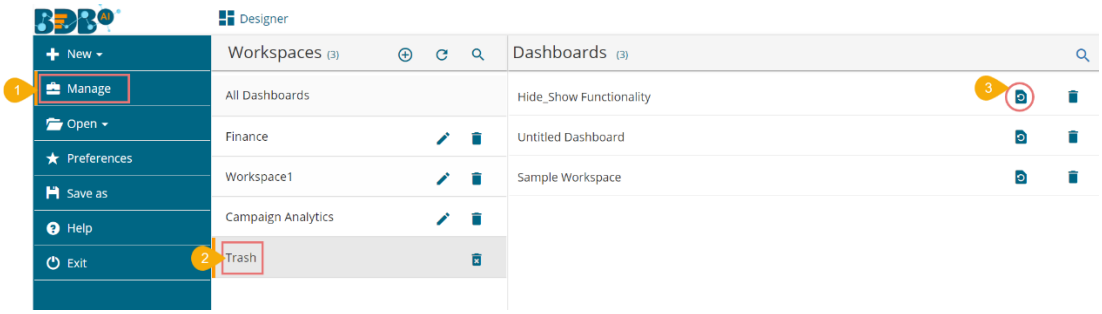
vii) The selected dashboard gets removed from the list.
viii) A message appears to notify the completion of the action.



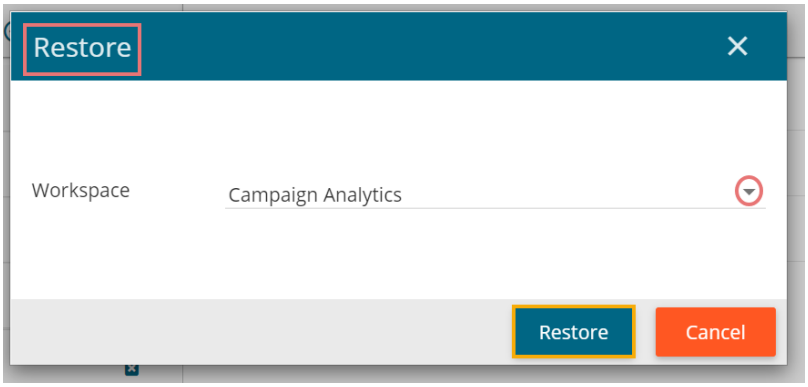
11.3.1. Restoring the Deleted Dashboard

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.

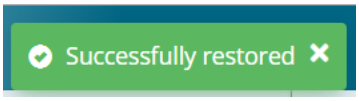
i) Click the '**Manage**' option from the Designer homepage.
ii) Navigate to the '**Trash**' workspace created under the list of all the workspaces.
iii) Select a deleted dashboard that you want to restore and click the '**Restore**' icon.



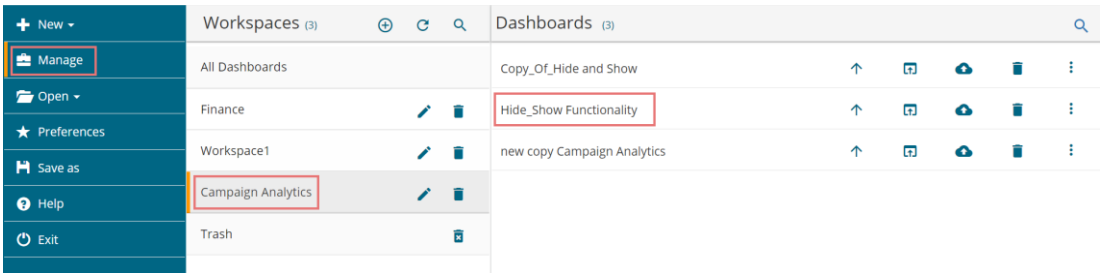
iv) A new window appears.
   i. Select a workspace using the drop-down menu.
   ii. Click the '**Restore**' option.



v) A success message appears to assure the restoration.



vi) The dashboard gets restored to the selected workspace.



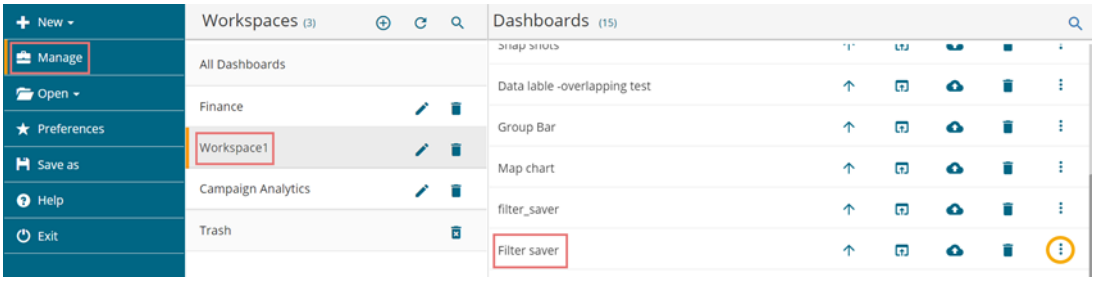
11.4. Actions

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

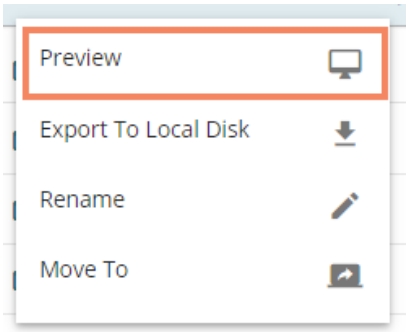
11.4.1. Preview

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 '**More Actions**' icon.

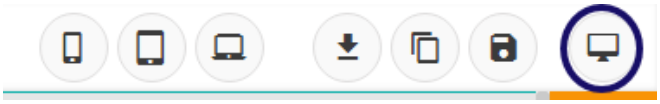


iii) Choose the '**Preview**' action from the context menu.



iv) The selected dashboard opens in the Preview mode.

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

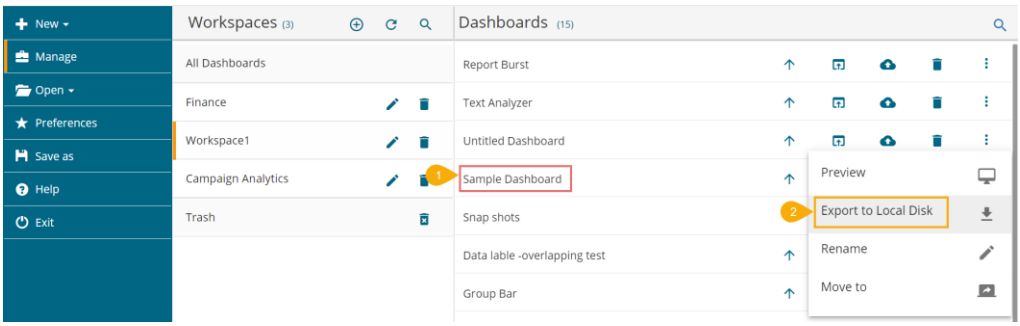


11.4.2. Export to Local Disk

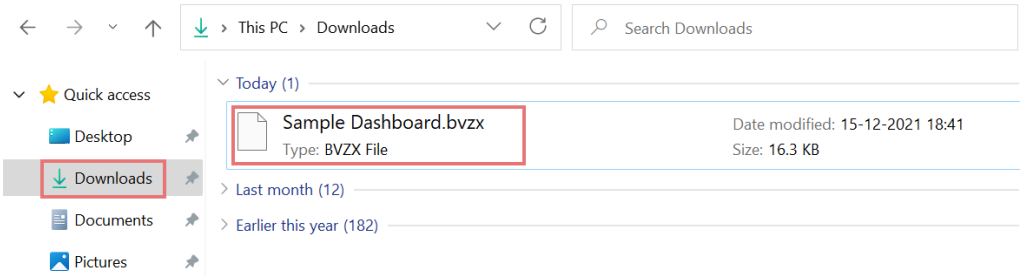
The '**Export to Local Disk**' option exports the selected dashboard to the local disk.

i) Select a dashboard using the '**Manage**' option.

ii) Choose the '**Export to Local Disk**' option from the '**More Actions'** context menu.



iii) The selected dashboard gets exported to the local disk.

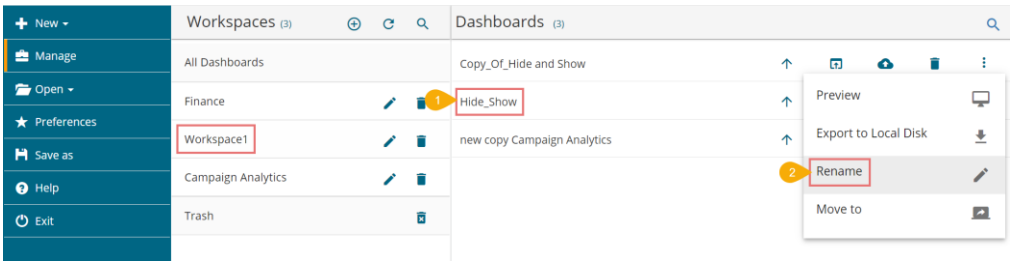


11.4.3. Rename

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

i) Select a dashboard using the '**Manage**' option.

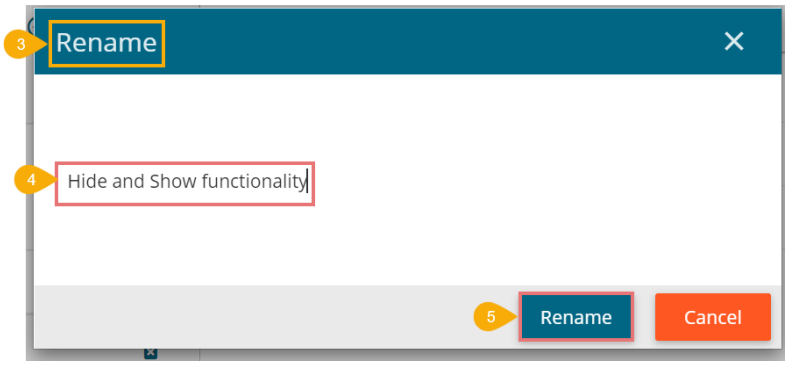
ii) Click the '**Rename**' icon from the '**More Actions**' context menu.



iii) The '**Rename**' window appears.

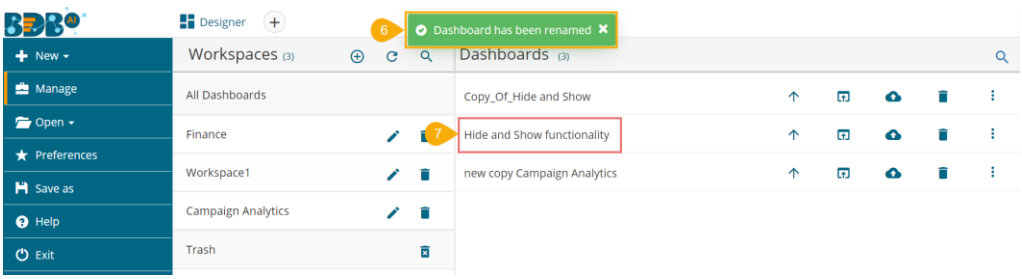
iv) Enter a new name for the selected dashboard.

v) Click the '**Rename**' option to save the new name.



vi) A success message appears.

vii) The selected dashboard gets renamed.

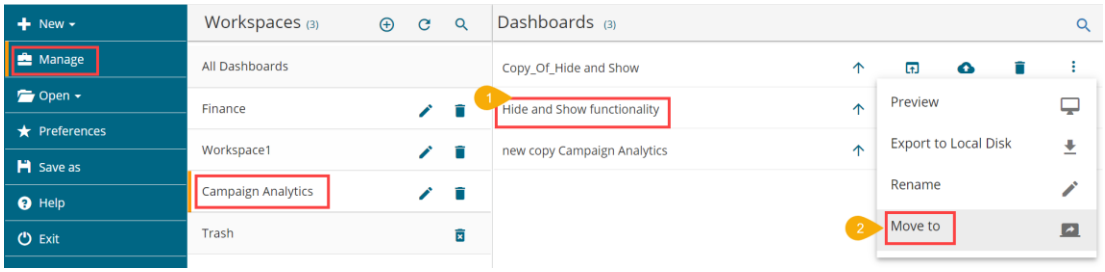


11.4.4. Moving a Dashboard

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

i) Select a dashboard using the '**Manage**' option.

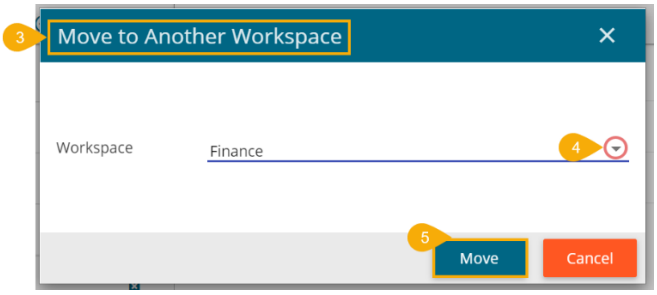
ii) Click the '**Move to**' icon from the '**More Actions**' context menu.



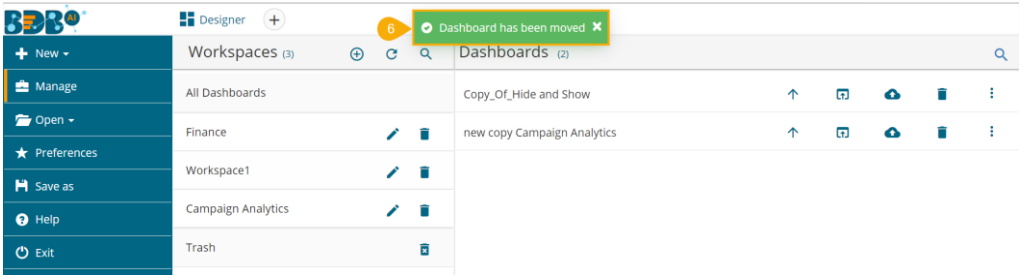
iii) The '**Move To Another Workspace**' window appears.

iv) Select a Workspace from the drop-down menu.

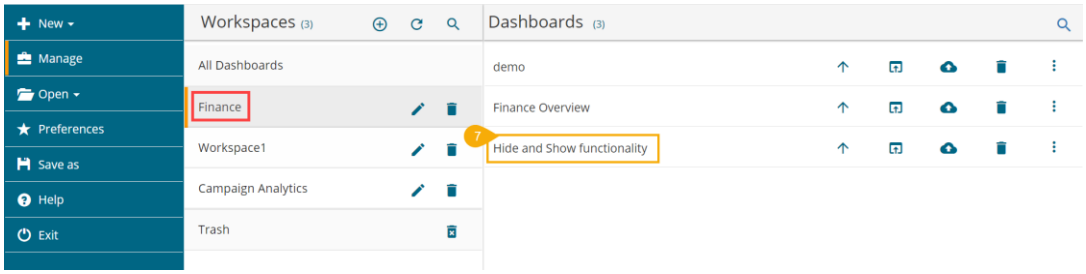
v) Click the '**Move**' option to move the selected dashboard into the desired workspace.



vi) A success message appears.

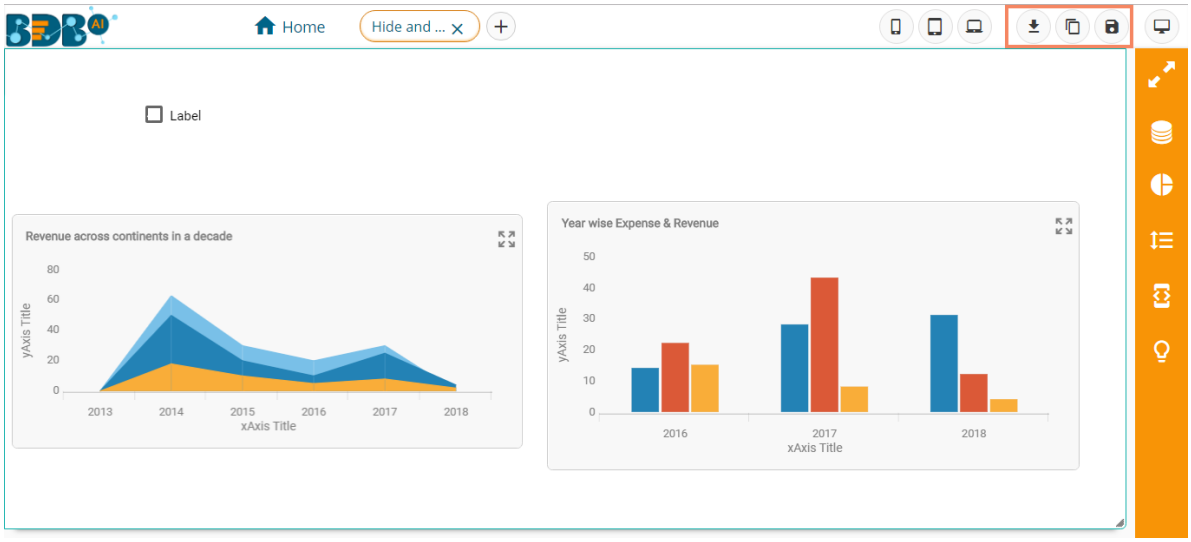


vii) The dashboard gets moved to the selected Workspace.



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

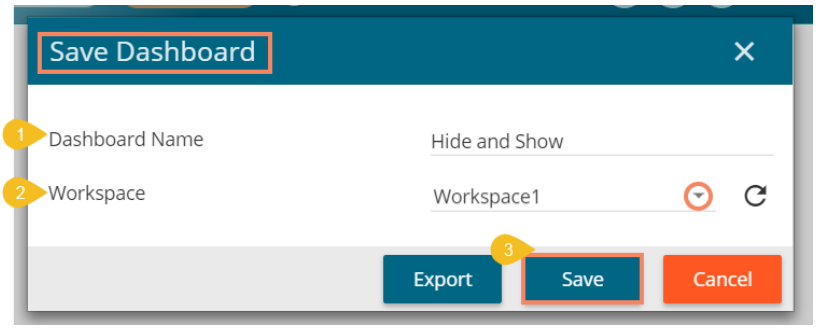
i) Click the '**Save**' icon from the Designer canvas header menu.

ii) A pop-up window appears with the following details:

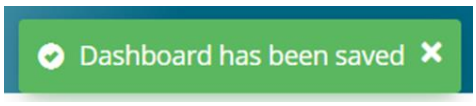
a. Dashboard Name: The name of the selected dashboard gets displayed.

b. Workspace: Select a workspace via the drop-down menu.

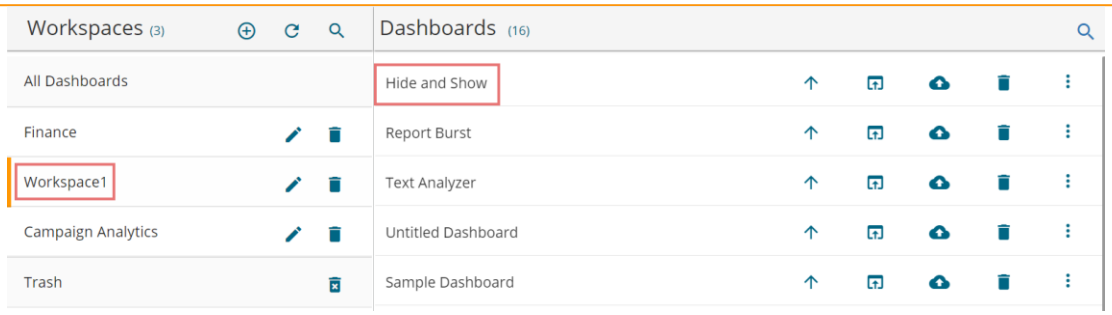
c. Click the '**Save**' option.



d. A success message appears to assure the same.



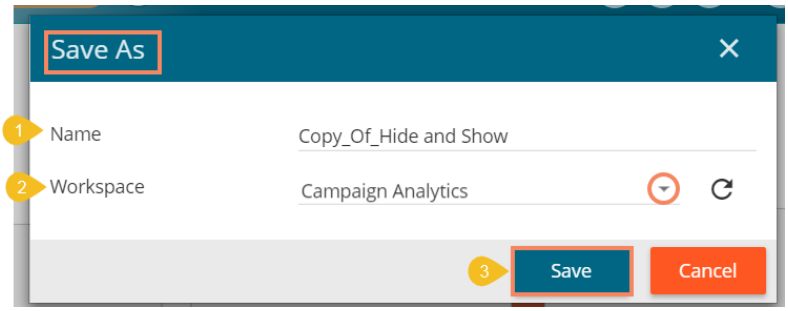
e. The dashboard gets saved to the selected workspace.



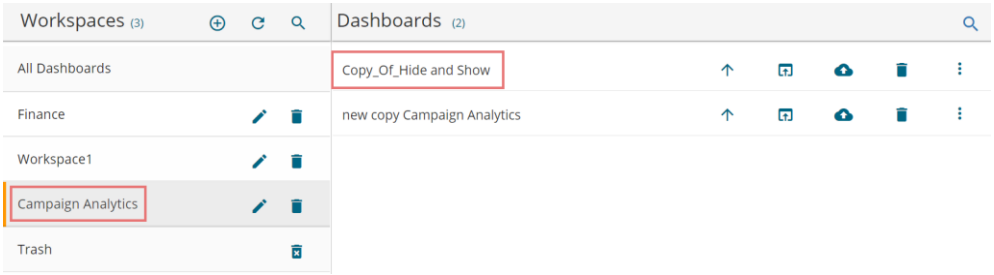
Note: Click the '**Export**' option from the Save Dashboard window to download the selected dashboard.

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.



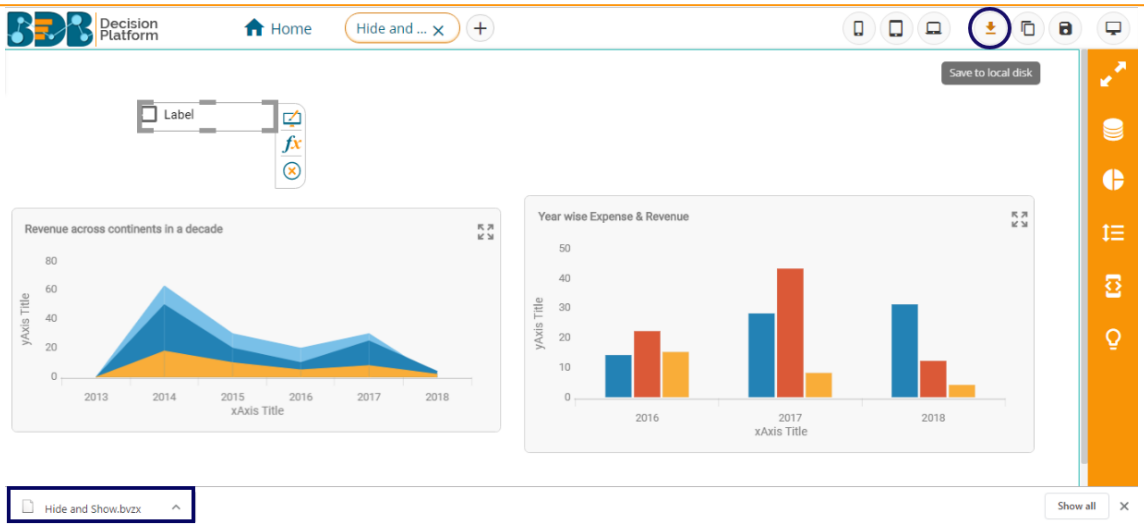
iii) A copy of the selected dashboard gets saved in another workspace.



12.3. Save to Local Disk

Dashboard which is created by users can be saved to local disk via the **'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.

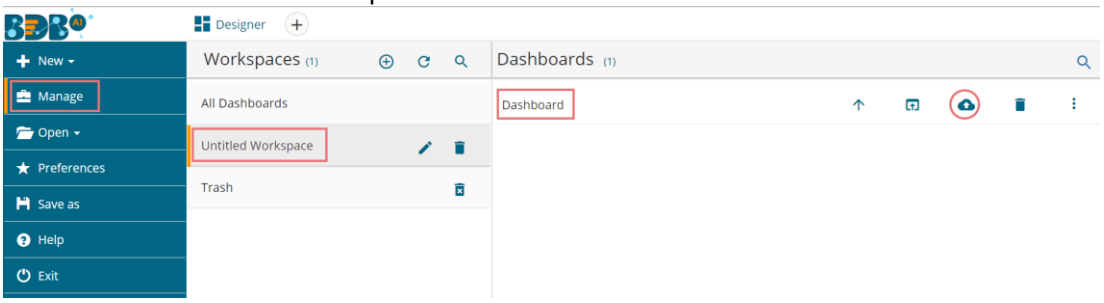


13. Options Provided to Published Dashboards

The user can publish various analytics dashboards to the BDB Platform homepage via the '**Publish to Portal**' option provided in the Dashboard Designer plugin.

i) The user needs to navigate to the dashboard list provided in a workspace.

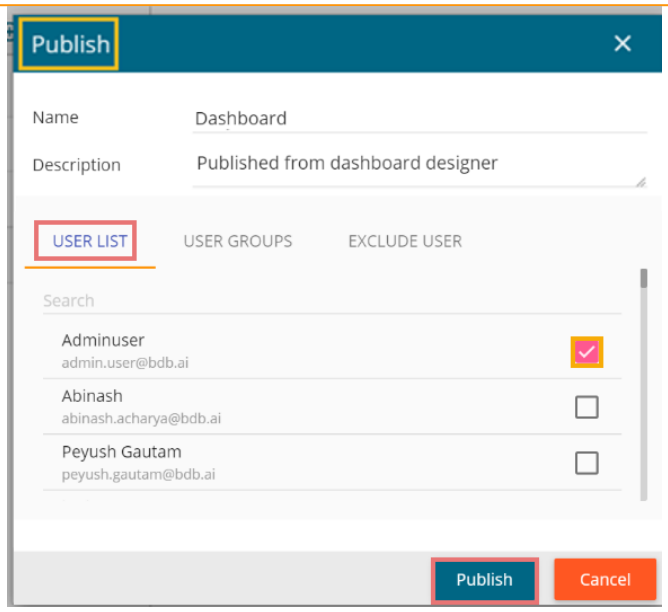
ii) Access the '**Publish to Portal**' option from the list of Dashboards.



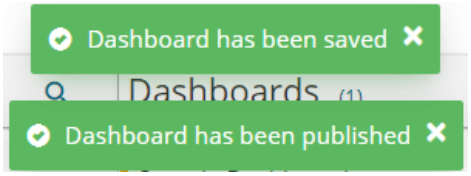
iii) The user gets redirected to a new wizard to choose a user or user group or exclude the user.

iv) Use a checkmark to choose the desired action.

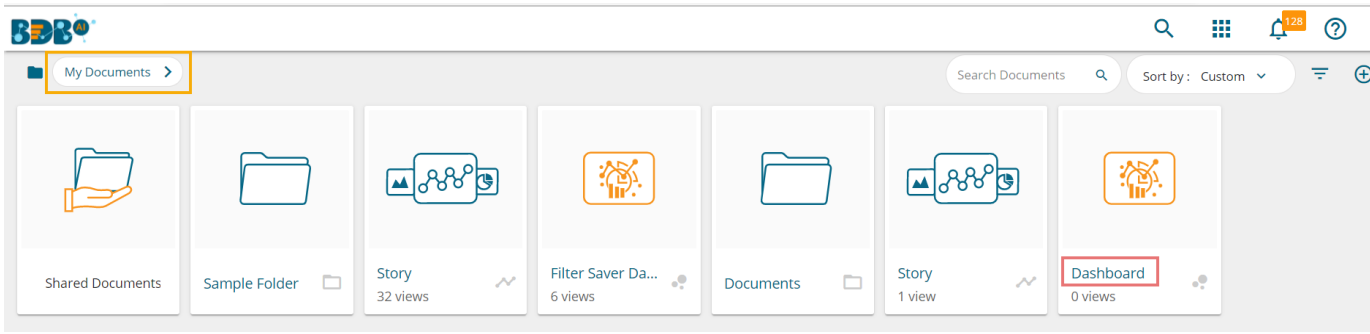
v) Click the '**Publish**' option.



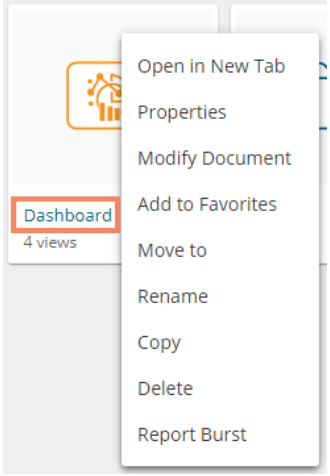
vi) Two consecutive messages appear to confirm that the selected Dashboard is published after saving the latest changes.



vii) The user can access the published dashboard from the given location. E.g., the location for the following dashboard is '**My Documents**.'



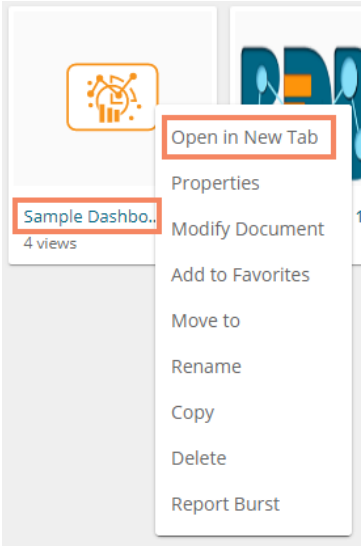
- **Operations Assigned to a Published Dashboard**
  - i) Navigate to the platform homepage.
  - ii) Select a published dashboard on My Documents or Public Documents.
  - iii) Use a right-click on the published dashboard to open various credited options in a context menu.



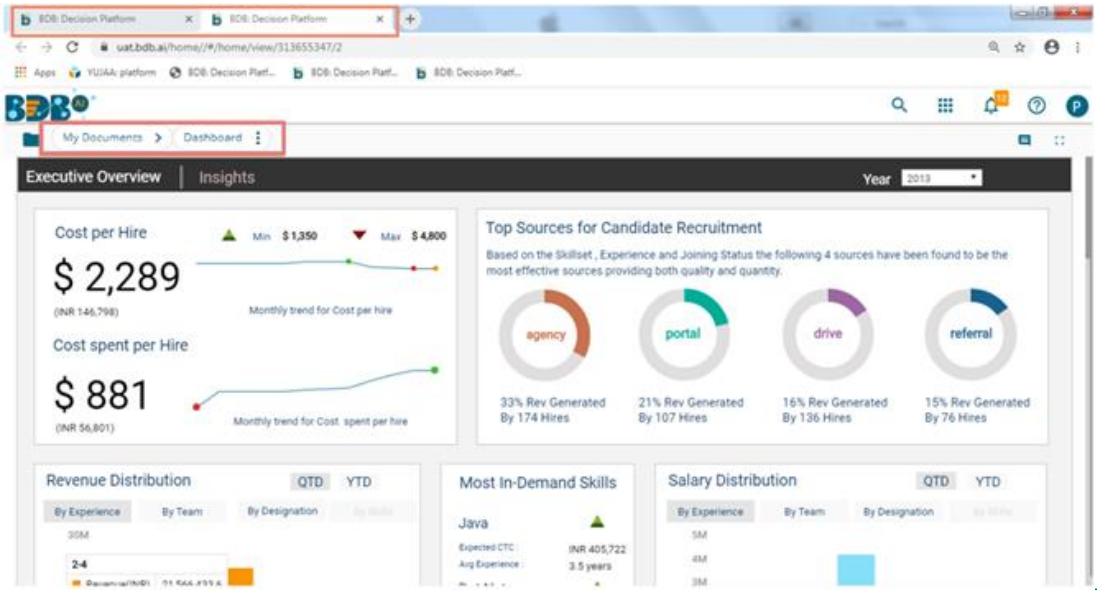
13.1. Open in New Tab

The user can open the selected dashboard in a new tab.

i) Select the '**Open in New Tab**' option from the context menu.



ii) The concerned dashboard opens in a new tab.

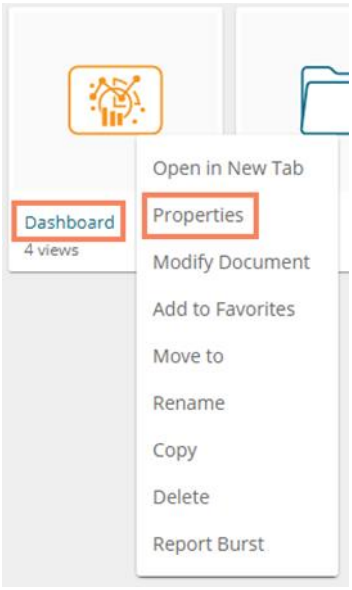


13.2. Properties

The user can access the properties details of a selected dashboard by using this option.

i) Select a dashboard.

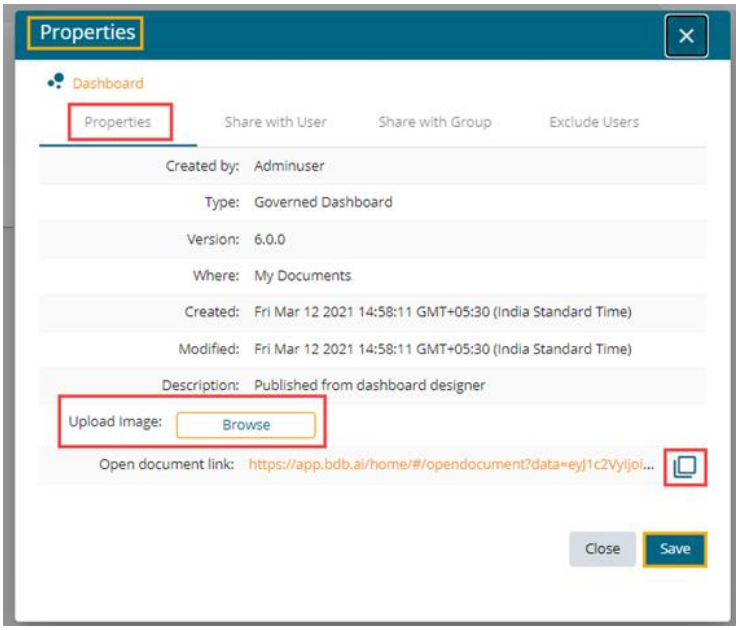
ii) Select the '**Properties**' operation from the context menu.



iii) The Properties window appears with four options.

a. **Properties:** The basic dashboard properties get displayed.

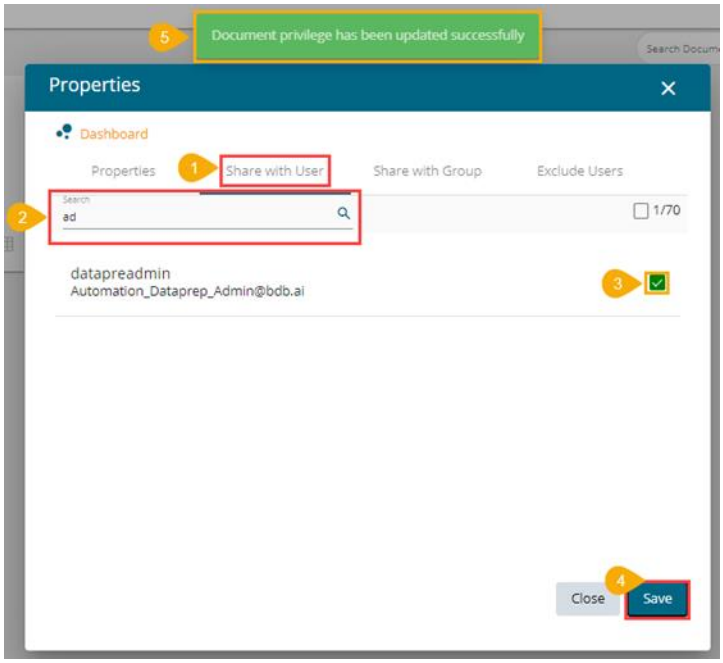
1. Click the '**Browse**' option to upload an image.
2. Click the '**Copy Link**' icon to copy the open document link of the published Dashboard.
3. Click the '**Save**' option to save the update.



b. Share with User: The dashboard gets shared with the selected user(s).

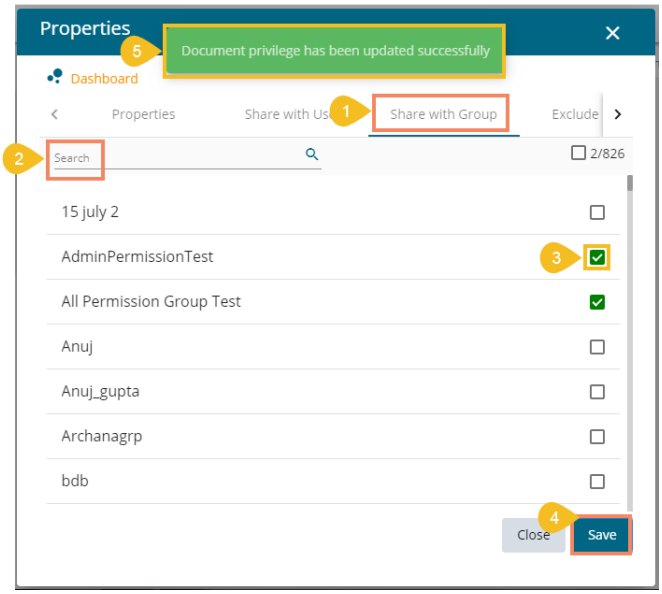
1. Select the '**Share with User**' option on the Properties window.

2. Search a specific user using the search bar.
3. Select a user or all the users by putting checkmark(s) in the given box(es).
4. Click the '**Save**' option.
5. A success message appears stating that the document privilege is updated.



6. The dashboard gets shared with the selected user(s).

c. **Share with Group:** The dashboard gets shared with the selected group(s).
1. Select '**Share with Group**' on the Properties window
2. Search a specific group by using the search bar.
3. Select a group or all the groups by putting the checkmark(s) in the given box(es).
4. Click the '**Save**' option.
5. A success message appears stating that the document privilege is updated.

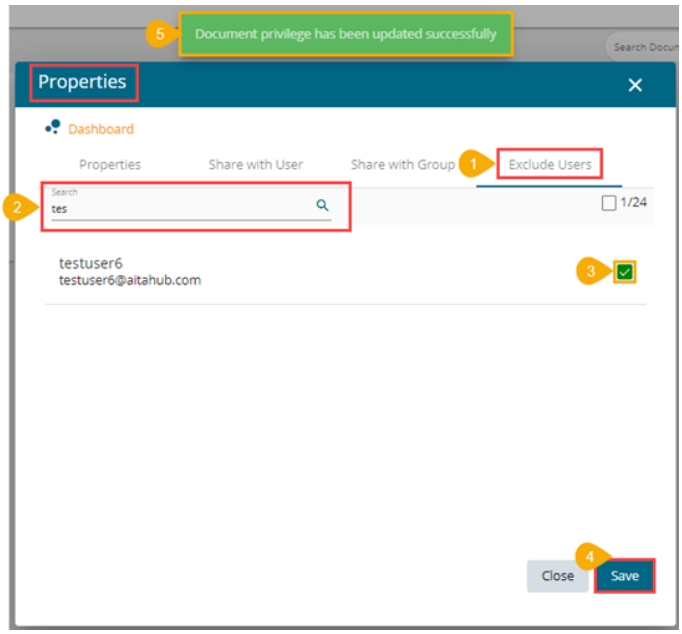


6. The dashboard gets shared with the selected group(s).

Note: If a dashboard document is shared using this option, then the selected users and user groups receive a view-only copy.

d. **Exclude Users:** The user gets excluded from the rights to access a dashboard**.**

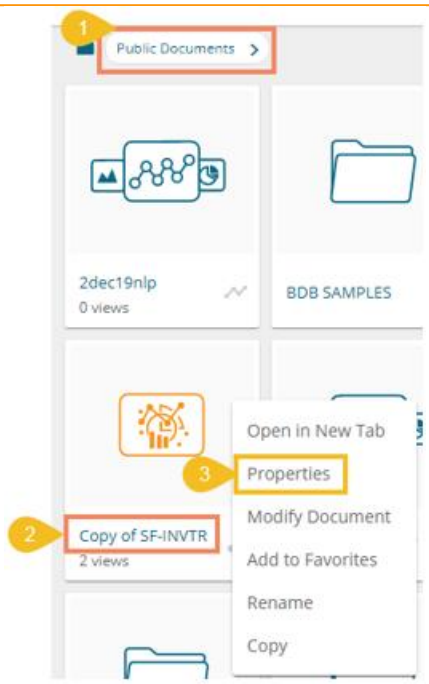
1. Select the '**Exclude Users'** option on the Properties window.
2. Search a specific user by using the search bar.
3. Select a user or all/multiple the users by putting checkmark(s) in the given box(es).
4. Click the '**Save**' option.
5. A success message appears, and the document privilege gets updated to exclude the selected user(s).



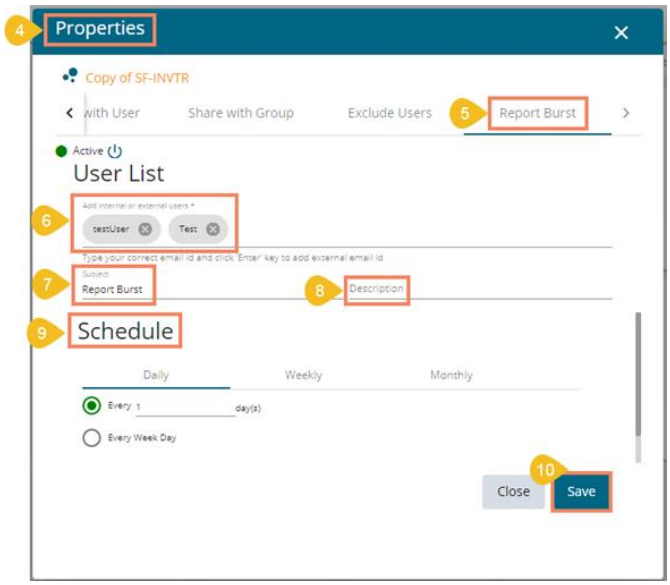
13.2.1. Report Burst

The Report Burst operation allows the user to share the open document link of a Dashboard to another user(s). The feature appears under the **Properties** option provided for a story created or shared under the '**Public Documents**' space.

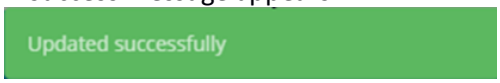
i) Navigate to the '**Public Documents**' documents space.
ii) Select a dashboard and open the context menu with the available operations.
iii) Click the '**Properties**' option.



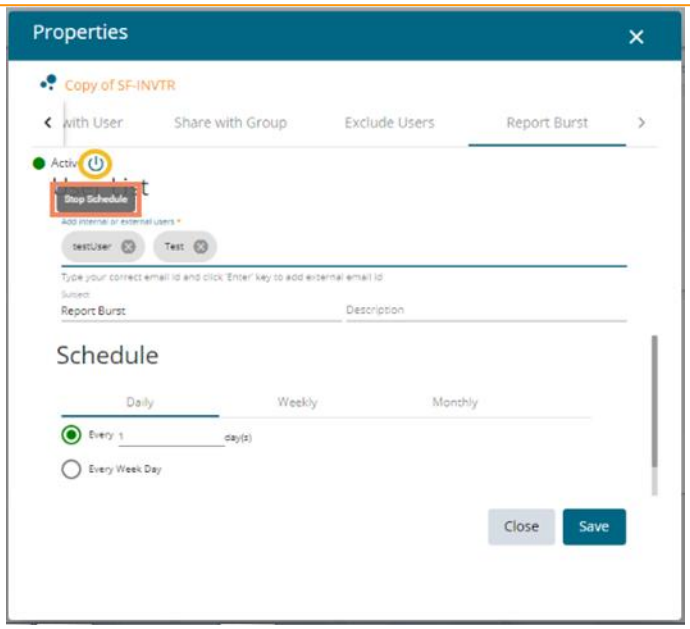
iv) The Properties window opens with multiple tabs.
v) Select the '**Report Burst**' tab.
vi) Add an external or internal user(s).
vii) Provide Subject.
viii) Provide Description (Optional).
ix) Schedule the selected story document by configuring the time range.
x) Click the '**Save**' option.



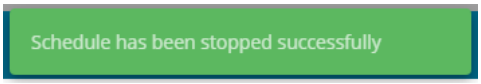
xi) A success message appears.



xii) The Scheduler status becomes active.
xiii) Click the '**Stop Schedule**' button to stop the scheduler.



xiv) A notification message appears to inform the same.

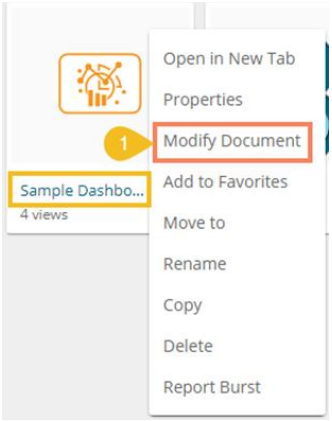


xv) The open doc link of the selected dashboard gets shared to the selected user at the scheduled time through the mail.

13.3. Modifying a Dashboard

This section explains step by step process to modify an existing dashboard.

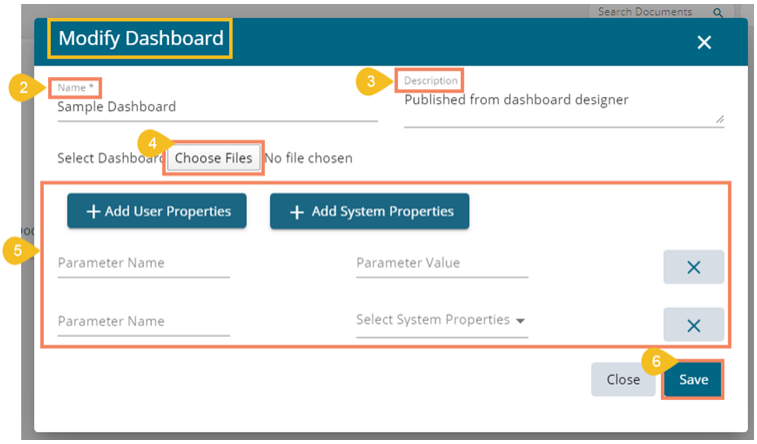
i) Select the '**Modify Document**' option from the Dashboard context menu.



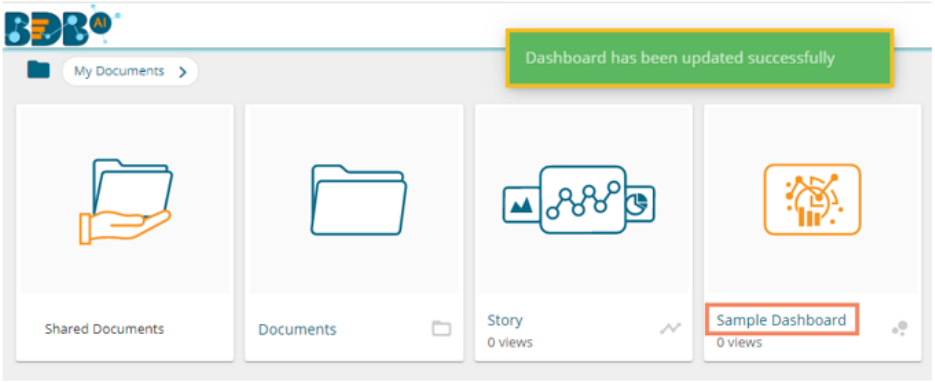
ii) The Modify Dashboard window opens.
iii) Enter the name for the dashboard.
iv) Describe the dashboard (optional).
v) Upload a dashboard file from the local drive via the '**Choose Files**' option. (The dashboard should be in a BVZ file format).
vi) Provide Dashboard Parameters.
   a. Click '**Add User Properties**' or '**Add System Properties**' option to add dashboard parameter(s).

b. Click the '**Remove**' option to remove the added dashboard parameter.

vii) Click the '**Save**' option.



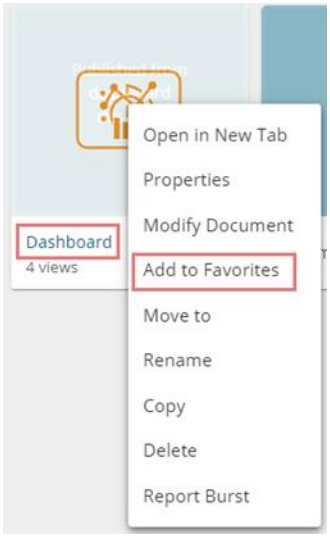
viii) A confirmation message appears to assure that the required data got updated.



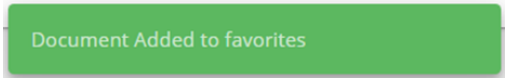
13.4. Adding/Removing a Dashboard to/from Favorites)

Administrators can add a dashboard to or remove it from the '**Favorites**' section.

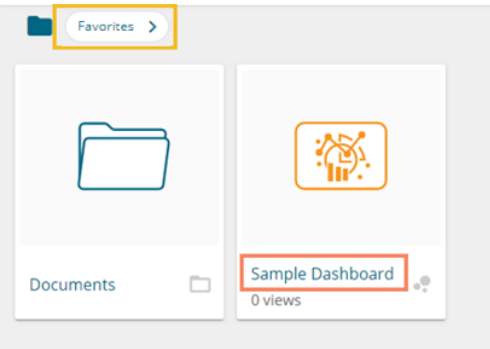
i) Select the '**Add to Favorites**' operation from the Dashboard context menu.



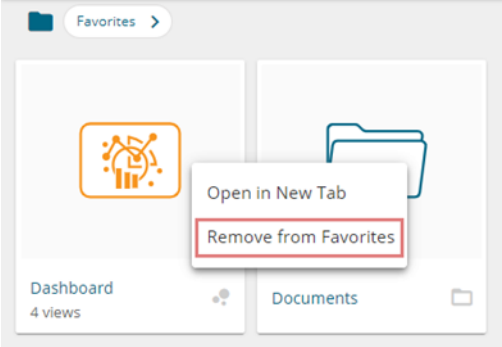
ii) A pop-up window appears with a message, "**Document added to Favorites**".



iii) The selected dashboard gets added to the '**Favorites**' section.

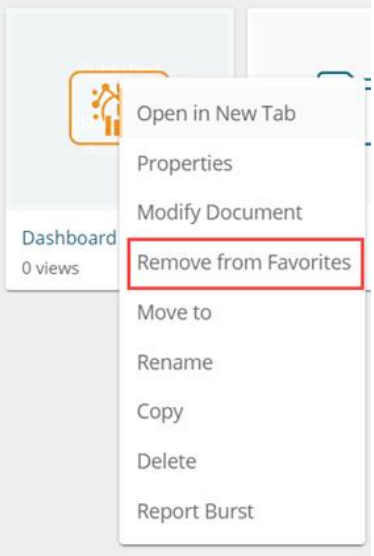


iv) Open the '**Favorites**' section.
v) Use right-click on the dashboard to get the remove option.
vi) Click the '**Remove from Favorite**' option.

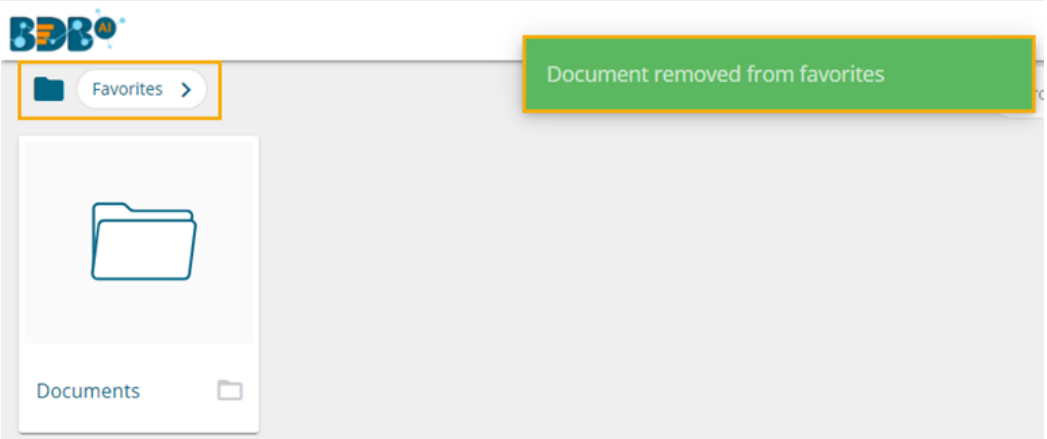


OR

Navigate to the original Dashboard.
Use right-click on the dashboard to get the remove option.
Click the '**Remove from Favorites**' option.



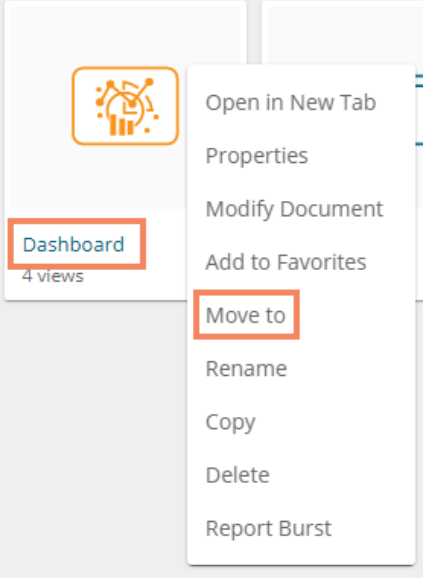
vii) A message appears to notify the removal of the dashboard from the Favorites.
viii) The dashboard gets removed from the **Favorites.**



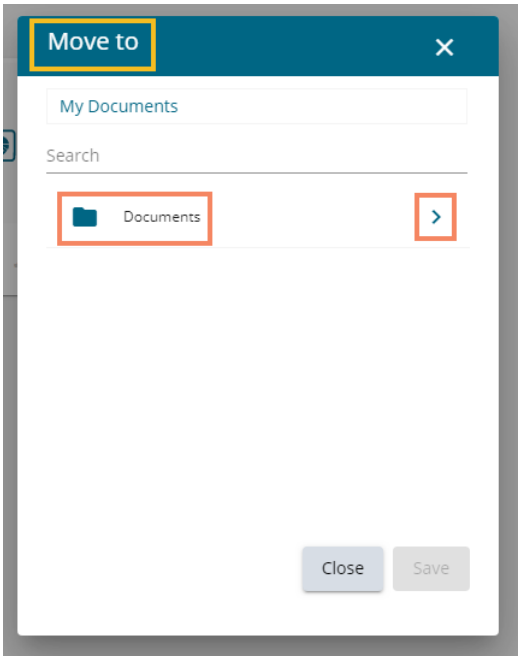
13.5. Moving a Dashboard

Administrators can move a dashboard from one folder or document space (E.g. 'My Documents') to another folder or document space.

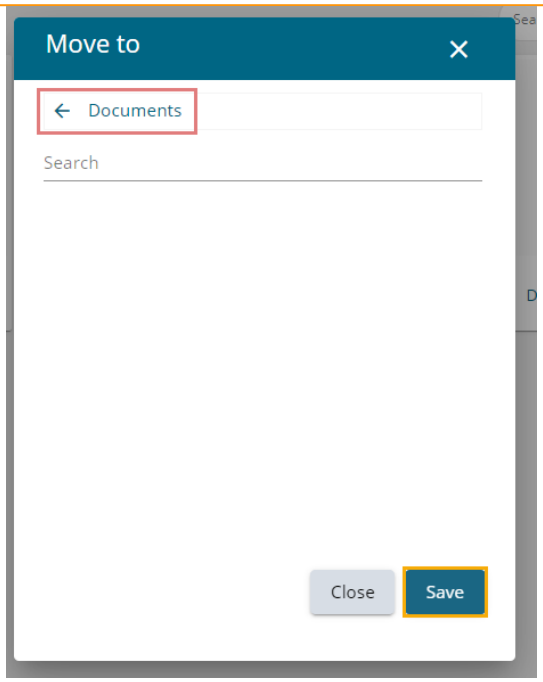
i) Select a dashboard.
ii) Select the '**Move to**' option from the operation context menu.



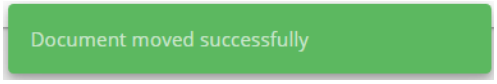
iii) The '**Move to**' window appears displaying the available folders.
iv) Select a folder.
v) Click the '**Move**' > icon.



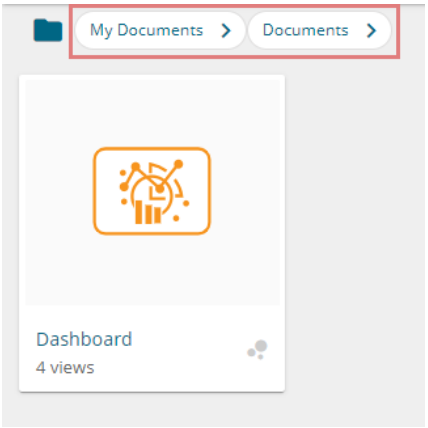
vi) The user gets redirected to the next screen where the selected folder appears on the top.
vii) Click the '**Save**' option.



viii) A success message appears.



ix) The dashboard gets moved to the selected space.

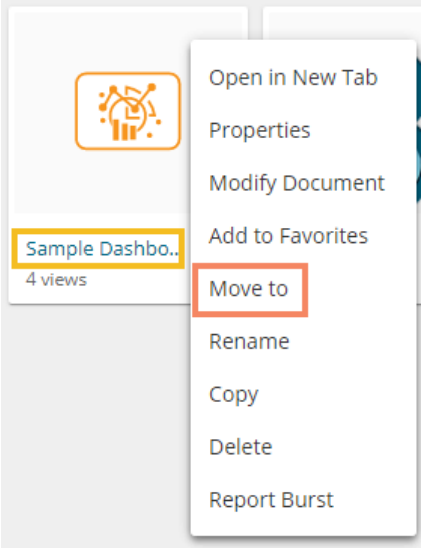


Note: To view a dashboard, use a click on the selected dashboard.

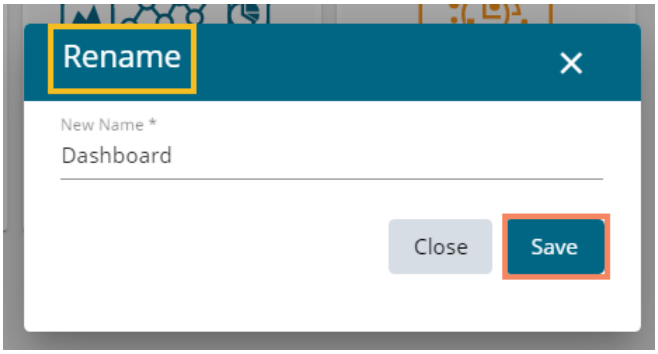
13.6. Renaming a Dashboard

The Administrator can change the name of an existing dashboard.

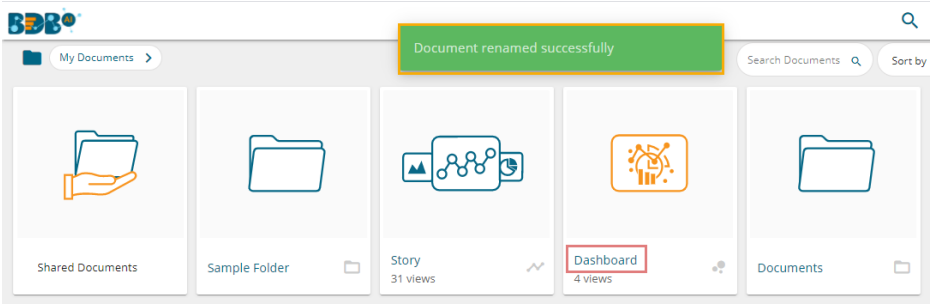
i) Select the '**Rename**' option from the Dashboard Operations menu.



ii) The Rename window opens.
iii) Enter a new name for the dashboard.
iv) Click the '**Save**' option.



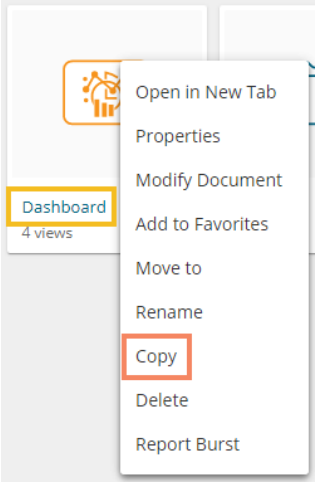
v) A message appears to assure the action.
vi) The selected dashboard gets renamed.



13.7. Copying and Moving a Dashboard

Administrators can copy an existing dashboard and paste it at any chosen place within My Documents or Public Documents of the platform.

i) Select a dashboard.
ii) Select the '**Copy**' option from the operation context menu.

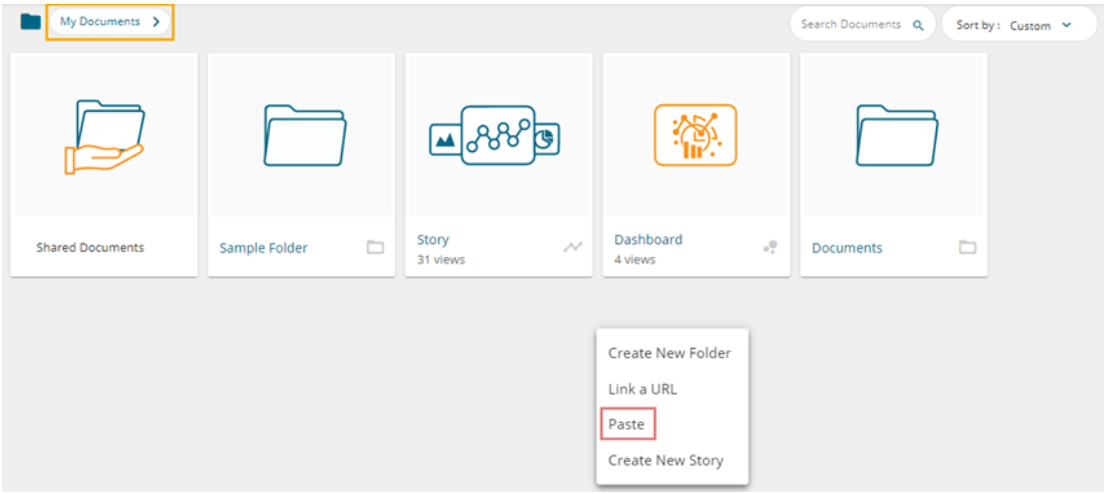


iii) Select another folder and open the menu with the credited options.
Or

iv) Navigate to '**My Documents**' or '**Public Documents**' and right-click anywhere on the blank space.

v) A context menu appears with the '**Paste**' option.

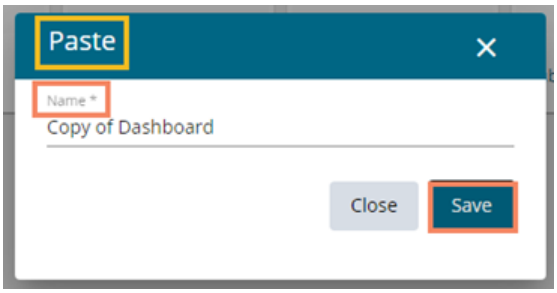
vi) Click the '**Paste**' option.



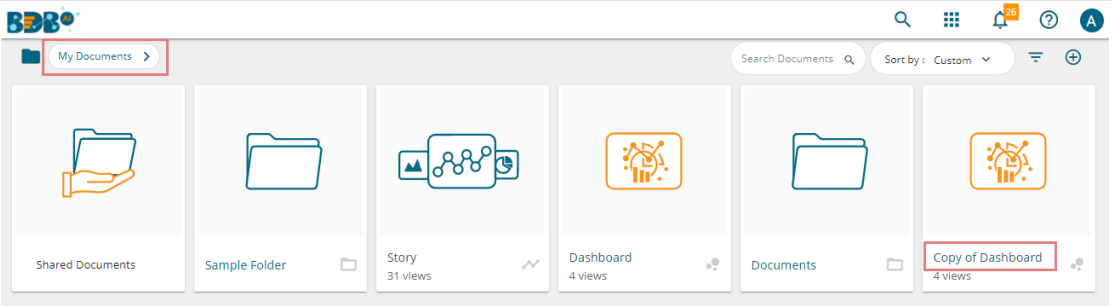
vii) The Paste window opens.

viii) The dashboard name displays the prefix '**Copy of-**' before the original name of the dashboard (E.g., *Dashboard* gets a new name *Copy of Dashboard*).

ix) Click the '**Save**' option.



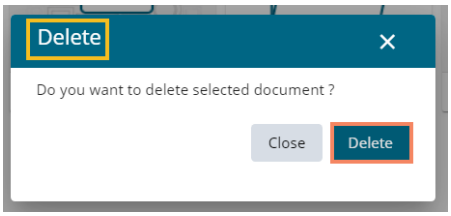
x) The selected dashboard gets copied with a different name.



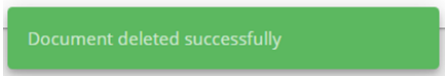
13.8. Deleting a Dashboard

Administrators can remove a dashboard by following the given steps:

i) Select a dashboard.
ii) Select the '**Delete**' option from the operation context menu.
iii) A new window pops-up to confirm the deletion.
iv) Click the '**Delete**' button.



v) A success message appears.

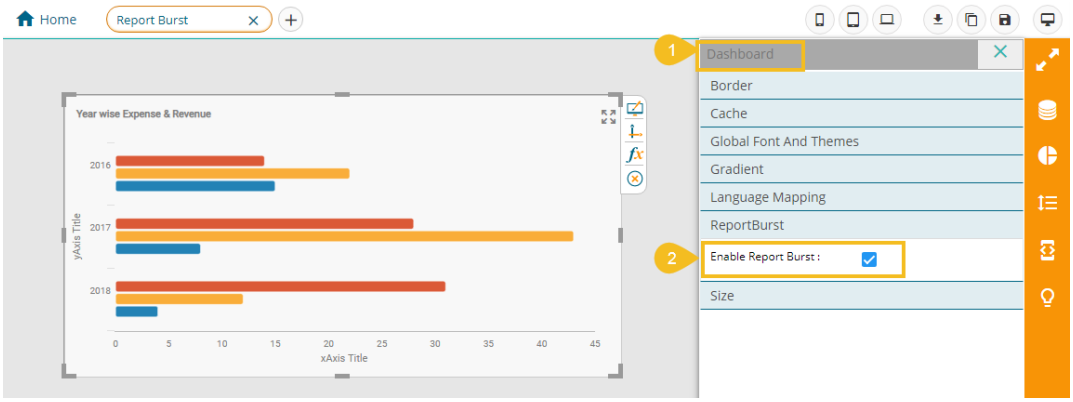


vi) The selected dashboard gets deleted.

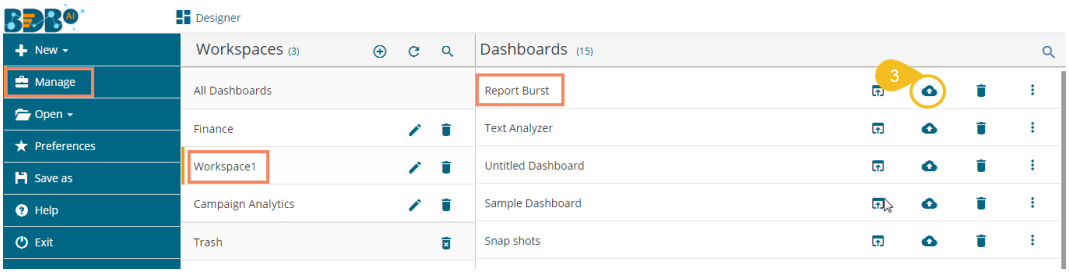
13.9. Report Burst

This feature helps to notify the selected users or user groups with the open link and PDF report of the selected dashboard.

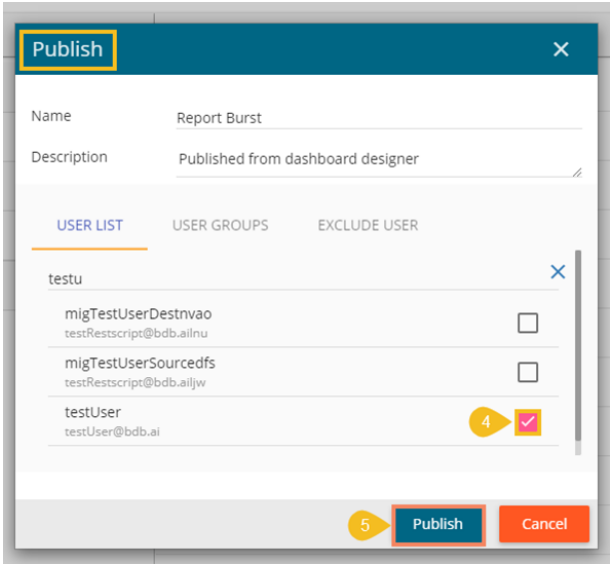
i) Open the Dashboard Properties for a selected dashboard.
ii) The Report Burst option comes enabled by default.



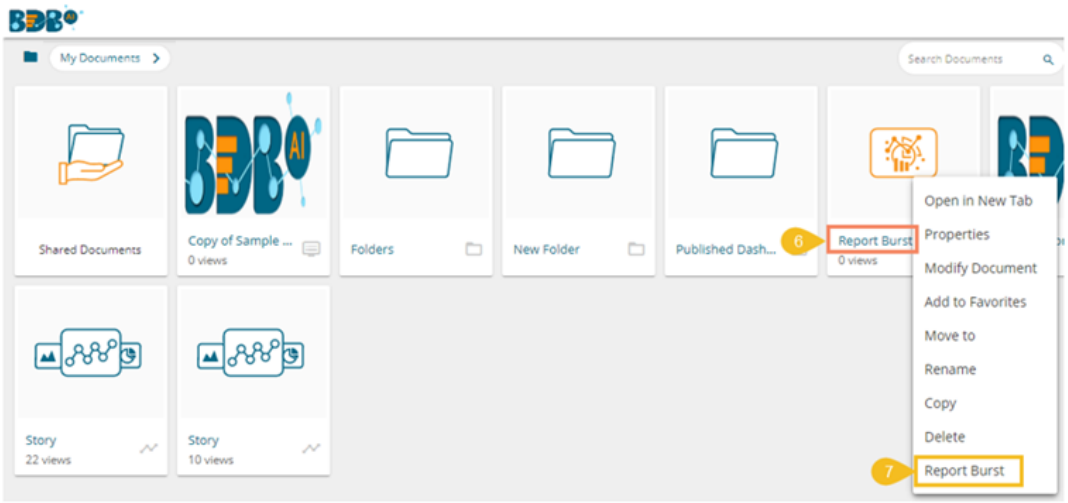
iii) Select the '**Publish'** icon for the dashboard.



iv) Select specific users/ user groups to whom the dashboard needs to be published.
v) Publish the dashboard to the selected users by clicking the '**Publish**' option.

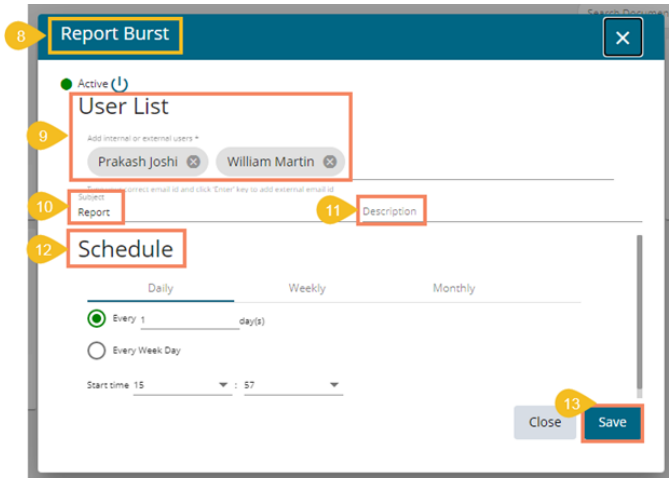


vi) The published dashboard gets added to the selected user account.
vii) Select the '**Report Burst**' option from the options menu.

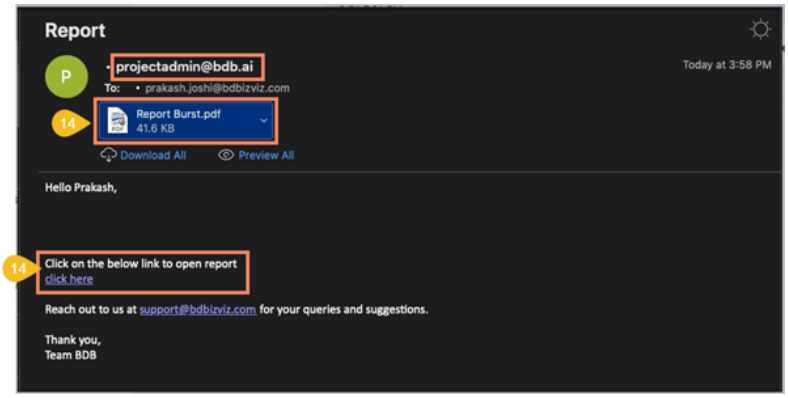


viii) The Report Burst window opens.
ix) Add the users or user groups.
x) Provide a subject.
xi) Provide description (optional).

xii) Schedule the report.
xiii) Click the '**Save**' option.



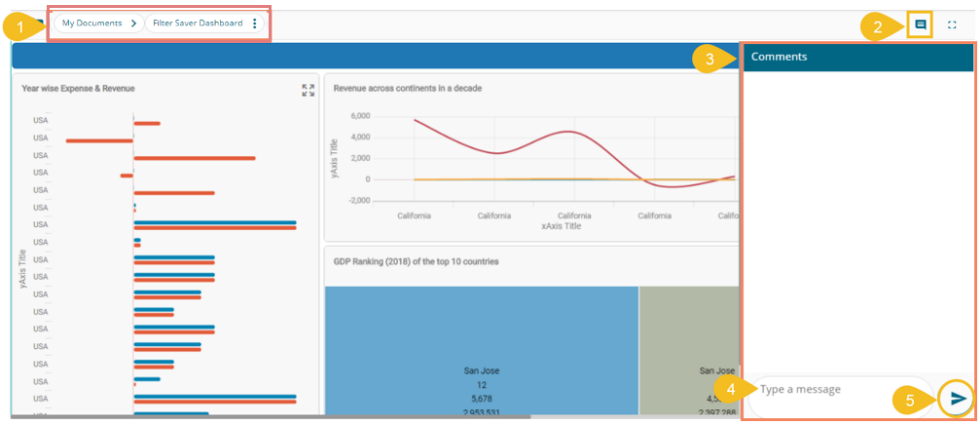
xiv) The open document link and PDF report get shared with the selected user(s)/ user group(s).



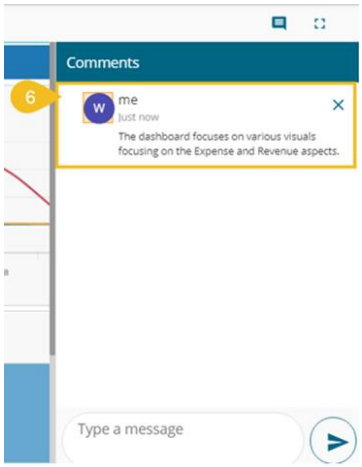
13.10. Insert Comments

The comment option is provided for the published Forms to explain or insert feedback for the form.

i) Open a published Dashboard from the BDB Platform.
ii) Click the '**Comments**' icon from the header.
iii) A new window opens below with space to insert a message at the end of the window.
iv) Type a comment in the given '**Message**' space.
v) Click the '**Send**' ➢ icon.



vi) The message gets added to the '**Comments**' window.



Note:

a. The '**Comments**' feature is enabled for all the users who can access the dashboard document.
b. The inserted comments display user initials and record of time.
c. **Full Screen** / **Reduce Size** icon is provided to view the form in full screen or reduce the form screen size.

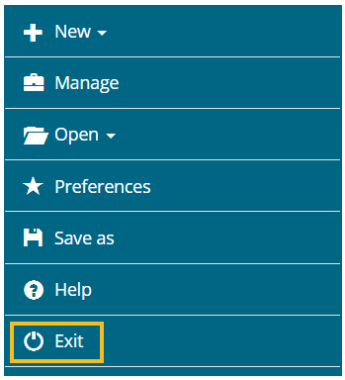
14. Signing Out

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

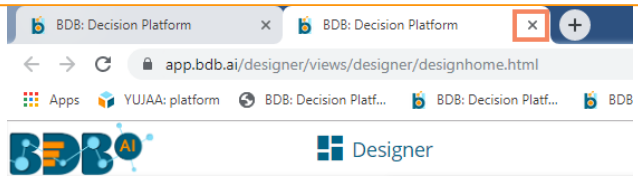
Closing the BizViz Dashboard Designer:

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

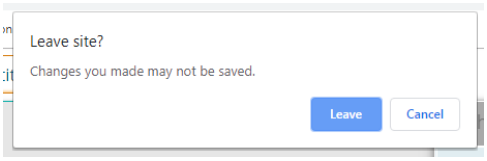
- Click the **'Exit'** option provided on the Designer homepage.



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

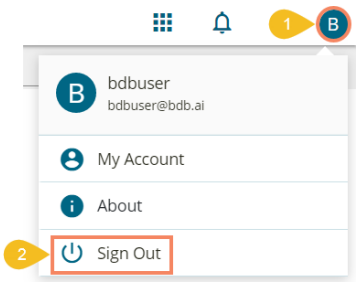


If you have not saved your work, you will be given the option to stay on the page or leave. If you have not yet saved your work, select '**Cancel**' and then save your work before exiting the page. Select the '**Leave**' option to close the Designer plugin.



Steps to Sign Out from the BDB Platform

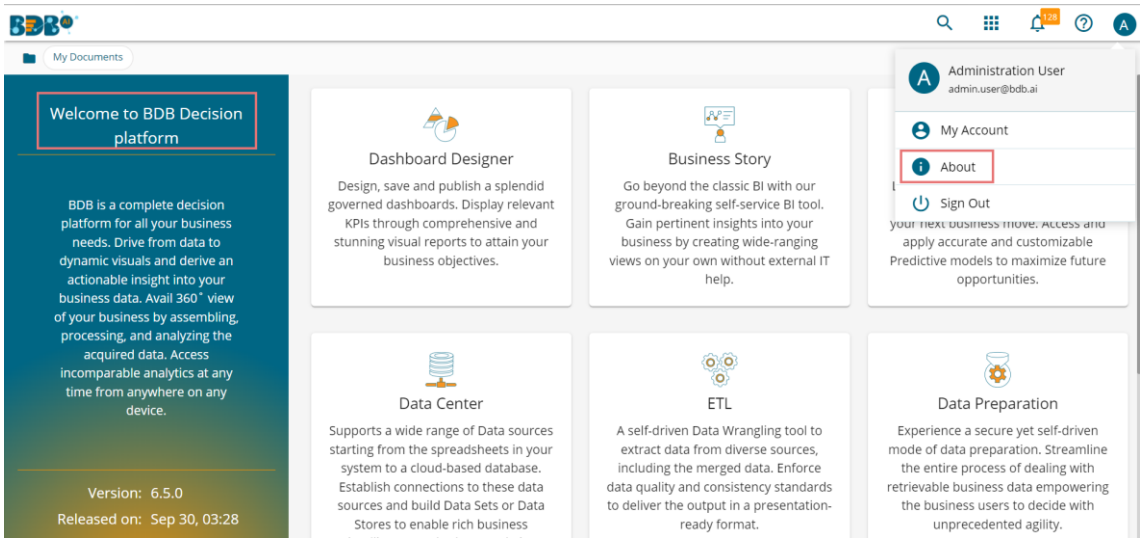
i) Click the '**User Profile**' icon on the Platform homepage.
ii) Click the '**Sign Out**' option.



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

Note:

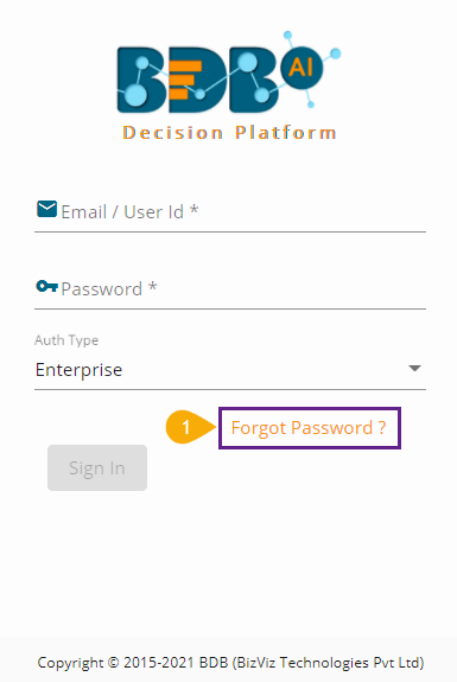
a. By clicking the '**Sign Out**' option, the user gets redirected back to the Sign-in page of the BDB platform.
b. Click the '**About**' option to open the default welcome page of the BDB Platform.



14.1. Forgot Password Option

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

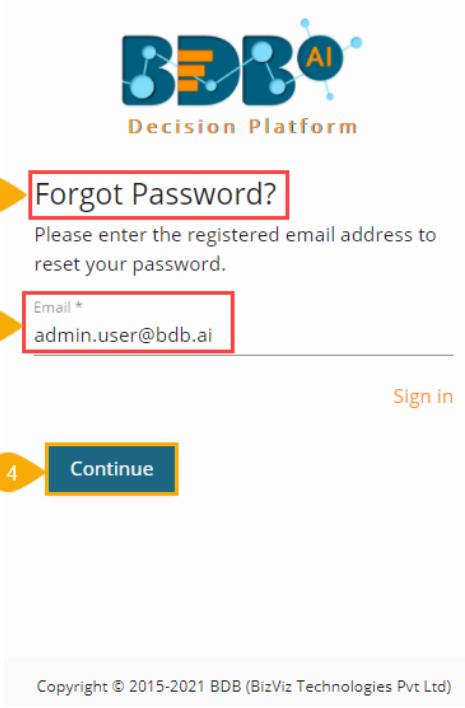
i) Click the '**Forgot Password?**' option from the Sign In page.



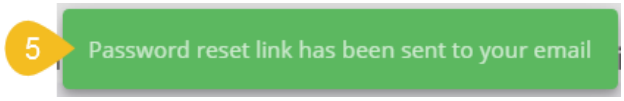
ii) The '**Forgot Password?**' page opens.

iii) Provide the email id that is registered with BDB to send the reset password link.

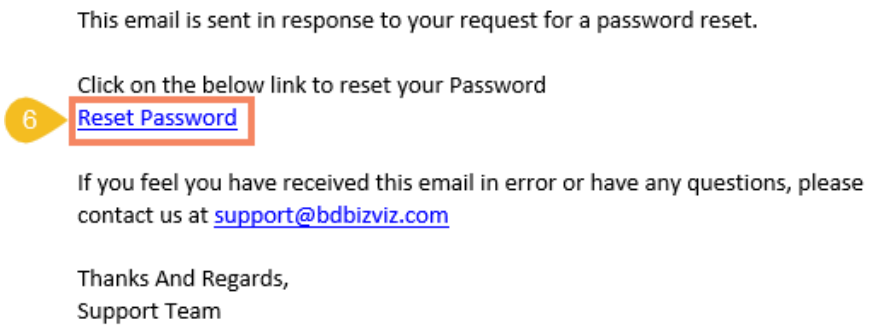
iv) Click the '**Continue**' option.



v) The user may be redirected to select a space in case of multiple spaces under one server link (The user needs to select a space and click the '**Continue**' option once again). In case if a user does not have multiple spaces, a message appears to notify the user that the password reset link (The users receive the reset link via their registered email.)

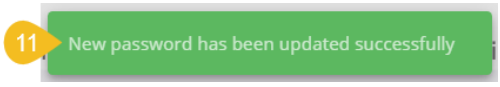


vi) Click the link from your registered email.



vii) The user gets redirected to the '**Reset Password**' page to set a new password.
viii) Set a new password.
ix) Confirm the newly set password.
x) Click the '**Continue**' option.

xi) The password for the selected BDB account gets reset and a message appears to inform the user.



Note: The user gets redirected back to the Sign In page after successfully resetting the password.

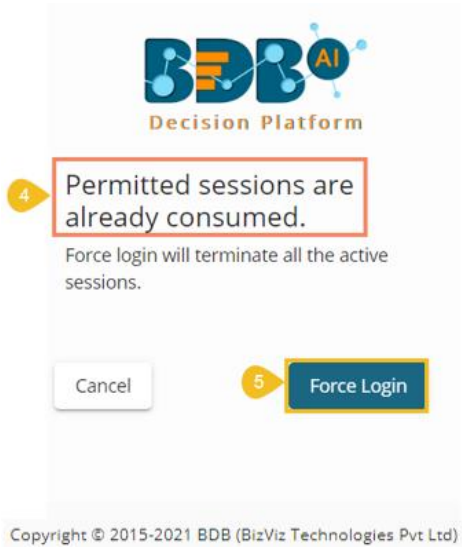
14.2. Force Login

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 the 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 '**Sign In**' option.

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



vi) A warning message appears the currently active sessions get killed, and the user gets redirected to the BDB Platform Sign In page.
vii) The user needs to provide valid credentials once again and click the '**Continue**' option to access the platform.