

# **User Guide**

## Dashboard Designer- 6.5



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## **1. About this Guide**

## 1.1. Document History

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

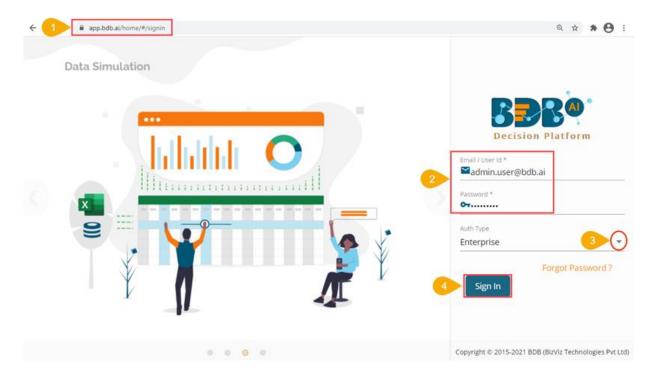
Google Chrome	Latest Version (recommended web browser)
Mozilla Firefox/Firefox ESR	Latest Version
Microsoft Edge	Latest Version
Apple Safari	10



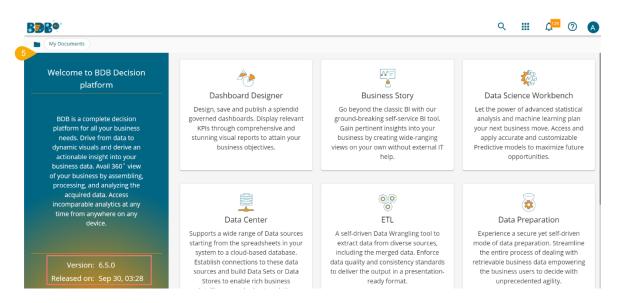
## 2. Getting Started with BDB Dashboard Designer

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.



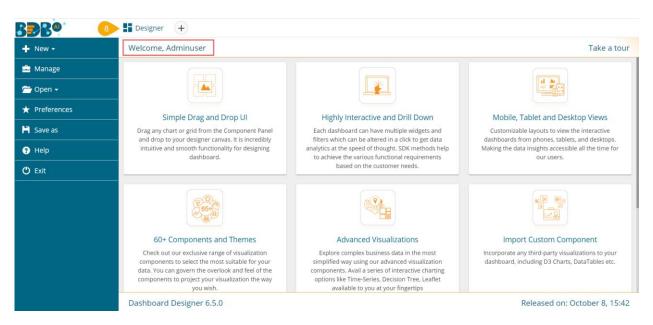
Note: The above screen opens only for those newly created users who have not yet created any document using the BDB Platform.

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





viii) The Designer homepage opens.

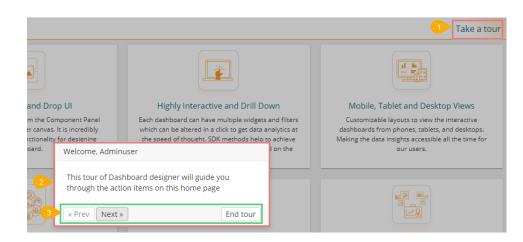


## 2.1. The Guided Tour to the Plugin

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).

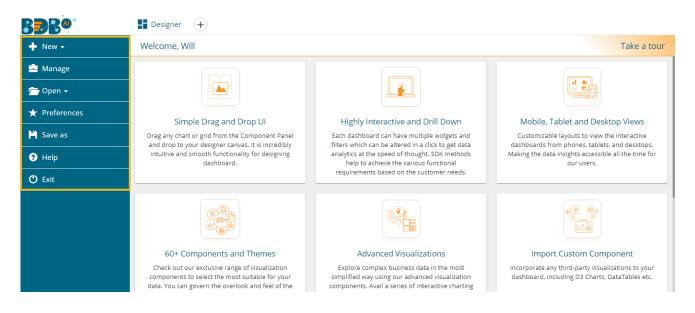




Note: Clicking the 'End tour' option ends the guided tour for the user.

## 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.

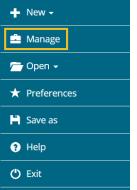


b. **Dashboard**: By clicking this option, the users get redirected to the Designer Canvass to create a new dashboard.



## 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

+ New -	Workspaces (2)	<mark>3⊕2℃1</mark> Q
🖆 Manage	All Dashboards	
🗁 Open 🗸	Workspace1	<b>₽∕₽</b> ∎
★ Preferences	Comparing Appleting	
💾 Save as	Campaign Analytics	
<ul> <li>Help</li> </ul>	Trash	6
🕐 Exit		

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:

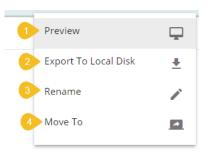
- i. Search: Searches for a Dashboard
- ii. GIT Export: Export a dashboard to GIT
- iii. Open in Designer: Opens the dashboard in Designer to Edit or modify
- iv. Publish to Portal: Publishes the Dashboard to the portal



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

BBB®	Designer +									
🕂 New -	Workspaces (3)	Ð	C	Q	Dashboards (2)				(	1-0
🚊 Manage	All Dashboards	/	_		demo	<b>^</b>	F	•	î	:
🚰 Open 👻	Finance				Finance Overview	2 ↑	3 д	4 0	5	6
🛨 Preferences			-	_					-	
🂾 Save as	Workspace1		1	Î						
Help	Campaign Analytics		1	•						
🖒 Exit	Trash			×						

- 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.

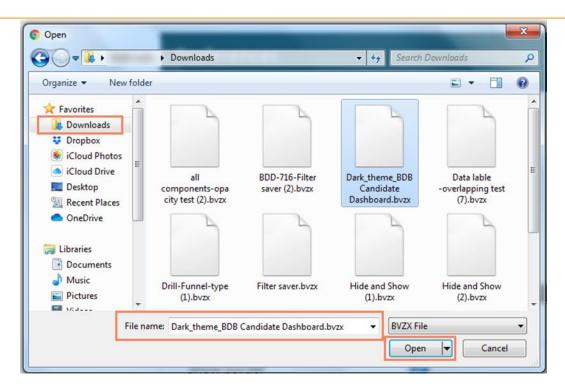
## 3.3. Open

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

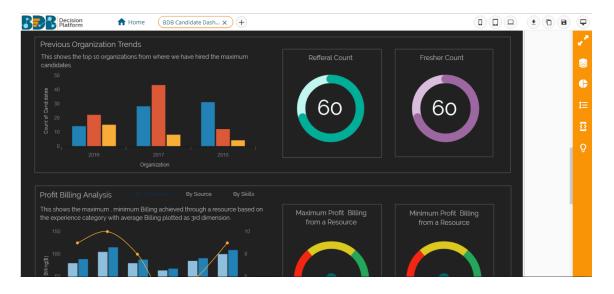
🕂 New -
🚊 Manage
🗁 Open 🔽
Open from Local Disk
★ Preferences
💾 Save as
? Help
🖒 Exit

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.



+ New -
🚊 Manage
🗁 Open 🗸
★ Preferences
💾 Save as
? Help
😃 Exit

- 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.

Preferences		
Show Grid Lines		
Snap to Grid Size	None	$\overline{\mathbf{O}}$
Notification on Success		
Block Notification	$\checkmark$	
Show Settings Button	$\checkmark$	
Selection Color		
Selection Thickness	1	
Show Border		
Border Color		
Background Color		
Hide Shadow		
Sync Component Property		
Enable Multiple Drag		
Fixed Dimension		
		Save

- 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.

	+ New -	Workspaces (45)	Ð	C	۹	Dashboards ()	Q
	🖻 Manage 🛛 💈 🔒	Trainning Workspace		/	13	Product Sales foreca	×
	Open from Local Disk	Cricket Analysis		1			
	★ Preferences	Education Solution					
	H Save as				•		
	Help	ConstruWise_Bonita		/	•		

- 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.

	Work 5 Save As X
💼 Manage	BDB Templati
Open from Local Disk	6 Name Copy_Of_Product Sales forecasting Logistics 7 Workspace BDB Templates  7 C
★ Preferences	Trainning Wo
4 Bave as	Cricket Analy:
😧 Help	
🖒 Exit	Education Solution
	ConstruWise_Bonita 🧪 🔋

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



Workspaces (45)	Ð	G	Q	Dashboards (3)			Q	
ODC Final version		/	<b>i</b> 9	Copy_Of_Product Sa	ſ.	6	Î	÷
BDB Templates		-	Î	Finance Dashboard	F	•	Î	:
Logistics		/	1	Expense Manageme	F	0	Î	:
Trainning Workspace		/	i i					

## 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.

BBB®	Designer	
+ New -	Introduction	
🚊 Manage	How to ? 🔻	BDB Dashboard Designer
🚰 Open 🗸	Component Gallery 🔻	It is a complete package to create governed dashboards with prebuilt capabilities which makes it simple enough for business users to understand yet robust enough to accommodate custom scripting and visual requirements. High leve
★ Preferences	Configuration 🔻	visualizations backed with accurate predictions, real time updates available at seamless speed provide precise insight to users to help them make informed business decisions.
💾 Save as	Connection 🔻	to users to help them make monified dusiness decisions.
? Help	Script & Samples	6 Getting Started with BDB Dashboard Designer Part-1
🕐 Exit	Keyboard Shortcuts	Watch later Share
	References	Preferences
	Online Support	Show grid files  Shap To Grid State None •
		hothy on success
		Block Notification
		Show settings button
		Selection trickness
		Show border
		Border color
		Beckground color
		Pixed dimension

## 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.

Apps v YUJAA: platform O BDB: Decision Platf b BDB     Designer     New -     Manage	Decision     Leave site?     Changes you made may not be saved.     Prevent this page from creating additional dialogs     Leave     Cancel	
Copen -	Show Grid Lines	]
★ Preferences	Snap to Grid Size No	one
H Save as	Notification on Success	
P Help	Block Notification 🗸	
() Exit	Show Settings Button 🗸	
	Selection Color	



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.





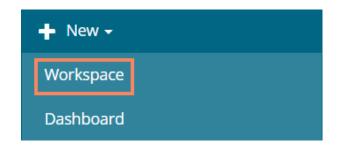
The user gets directed to the BDB Platform home page after closing the designer application.

## 4. Workspace

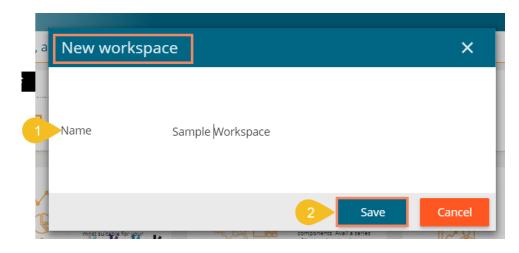
### 4.1. Creating a Workspace

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**.



+ New -	Workspaces (5)	Ð	G	Q
🚔 Manage	All Dashboards			
Open from Local Disk	Sample Workspace	_	/	
★ Preferences	MigrationTestdashboard	/	Î	
💾 Save as	Untitled Workspace			
Help	Sujith			-
😃 Exit	workflowCheck			-
	WORKHOWCHECK			•
	Trash			×

## 4.2. Renaming a Workspace

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

	Workspaces (5)	Ð	С	Q
	All Dashboards			
1	Sample Workspace	2		Î
	MigrationTestdashboard			Î
	Untitled Workspace			Î
	Sujith			Î
	workflowCheck			Î
	Trash			×

- 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.



3 Rename	×
4 Workspace1	
	5 Rename Cancel

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

	signer 6 📀 Workspa	ce has l	peen rer	named 🗙
+ New -	Workspaces (2) 🕀	C	Q	Dashb
🚊 Manage	All Dashboards			
🗁 Open 🗸 🔽 🔽	Workspace1	-	î	
★ Preferences	Compaign Analytics	۵	_	
💾 Save as	Campaign Analytics			
Help	Trash		×	
🖒 Exit				

## 4.3. Deleting a Workspace

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

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

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



3	Remove	×
.c 	If you are removing the workspace "Workspace1", dashboards under the workspace will be moved to Trash. Are you sure to move it to trash?	
	4 Remove Car	icel

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

5	Workspaces (4)	$\oplus$	G	Q
	All Dashboards			
	MigrationTestdashboard		/	Î
	Untitled Workspace		/	Î
	Sujith		/	Î
	workflowCheck		/	Î
6	Trash			Î

#### 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 <sup>C</sup> provided next to the Workspaces list to load all the workspaces again.
- c. Click the 'Restore' con from the 'Trash' workspace to restore deleted workspaces.
  i. Click the 'Manage' option.
  - ii. Navigate to the '**Trash**' workspace created under the list of all the workspaces.
  - iii. Select a deleted workspace that you want to restore and click the '**Restore**' **D** icon.

🕂 New -	Workspaces (4)	Ð	G	۹	Dashboards (1)	Q
📤 Manage	All Dashboards				Workspace1 3	Î
Open from Local Disk	MigrationTestdashboard		/	ĩ		
★ Preferences	Untitled Workspace					
Ave as	Sujith			-		
Help	-		·	-		
🖒 Exit	workflowCheck		-	Î		
2	Trash			B		



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

## 5. Designer Canvas

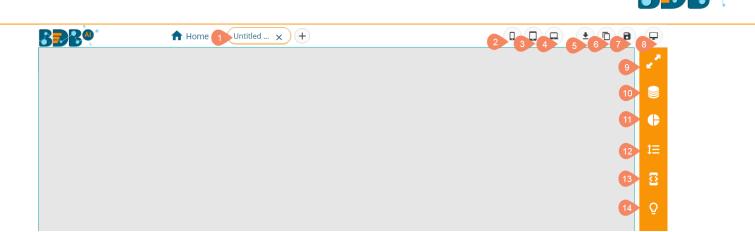
Dashboard Designer space can be understood as a folder that contains Data Source connections, Components, Dashboard Objects, Component Attributes.

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 2: Displays Dashboard screen like a Mobile device
- **3. Tablet U**: 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 **5**: 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 <sup>2</sup>: Option used to define component scripts.
- **14.** Guided Tour **!**: Begins the guided tour for the Designer canvas.



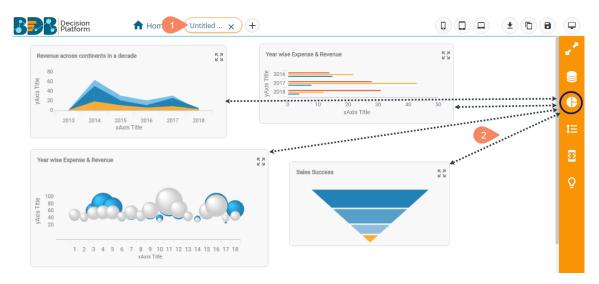
Note:

- a. Users will be redirected to the Designer homepage by clicking the '**Home**' **h** 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.

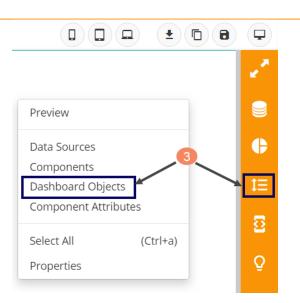
- i) Navigate to the Designer Canvas.
- ii) Select and drag multiple components to the canvas using the 'Component Library' icon.



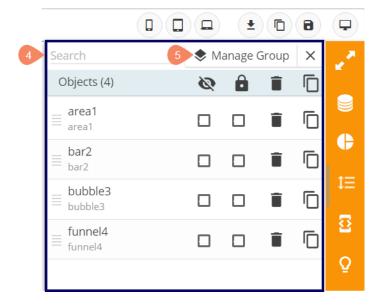
iii) Use the right click on the canvas to access the 'Dashboard Objects' option.

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' vicon 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.



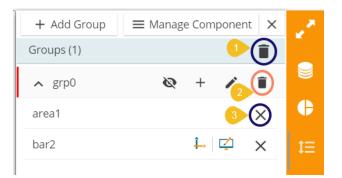
viii) Select the dragged component that you wish to add to the created group.



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.

Revenue across continents in a decade	Year wise Expense & Revenue	2
100	кл Т	Preview
		Data Sources
2013 2014 2015 2016 2017 2018 xAxis Title	0 10 20 30 40 50 xAxis Title	Components
XAXIS Hue		Dashboard Objects Component Attributes
ear wise Expense & Revenue	5.7	Select All (Ctrl+a
al wise Expense a Revenue	Sales Success K 7	3 Properties
18		
1 2 3 4 5 6 7 8 9 101112131415161718		



iv) The following Canvas properties will be displayed:

4	Dashboard		×
	Border		
	Global Font And Themes		
	Gradient		
	Language Mapping		
	Size		
	Screen Size :	Custom	•
	Width :	1182	
	Height :	518	
	Enable Scaling :		
	Scaling View :	Fit to page	•

## a. Border

Border	
Thickness :	1
Border Color :	

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

#### b. Global Font and Themes

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

Parameter Name	Description
Use Global Shadow	Enable this option to display global shadow
Shadow Color	Select a color from using the menu
Shadow Transparency	Set the transparency for the shadow



Use Global Font	Enable this option to use the global font.
Font Family	Select a font type from the drop-down menu.
Designer Themes	Select a theme from the drop-down menu.

#### c. Gradient

Gradient	
Background Colors :	٩
Opacity :	1
Background Rotation :	0

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

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

Background gradient colors. The users can select a color using the menu and click the 'Save' option to apply the selected background gradient color.

Background gradient colors		×
Color		
More Colors		
+ Add Color	Save	Cancel

## d. Language Mapping

Language Mapping	
Enable :	
Hide Curly Braces :	
Select a Mapping:	C

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

the



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.

Language Mapping	Selection	×
Mapping List	Language Settings Test_Guj_Lang.	
	2 Save	Cancel

#### e. Size

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

Parameter Name	Description
Screen Size	Select an option from the drop-down menu.
Width	Increase/decrease 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.



	Dashboard		×			
	Border					
	Global Font And Themes					
	Gradient					
	Size					
1	Screen Size :	Custom	•			
	Width : 2	Custom Ipad Portrait(768 X 1024) Ipad Landscape(1024 X 768) Iphone Portrait(414 X 736)				
	Height :					
	Enable Scaling :					
	Scaling View :	Iphone Landscape(73 800 X 600	o x 414)			
		1280 X 1024 1600 X 900	-			

## 5.3. Context Menu Properties

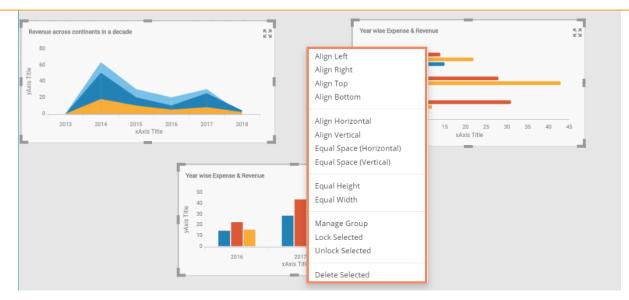
(

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

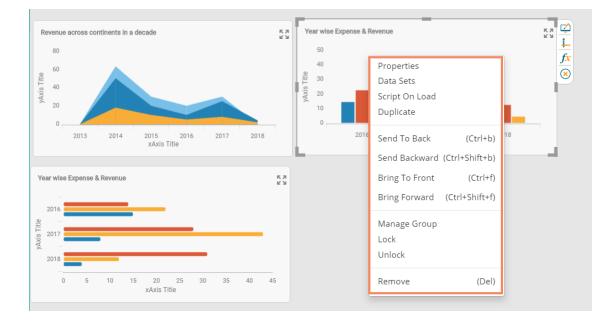
Steps to Access the Context Menu Properties:

- i) Drag multiple components into the designer canvas (At least three components to avail all the properties).
- ii) Select multiple components from the canvas. (At least three)
- iii) Use right-click to open the context menu.
- iv) The following properties will be listed in the context menu:
  - a. Align Left: All the selected components 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.
  - I. 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



BBB®	<b>A</b>	lome Untitled x +		
2 CSV	+			×
Excel	+			
Data Service	+			
Data Science Service	+			1
Data Store	+	Please create a connectior		
Data Sheet	+	Please create a connection	1:	
Web Socket	+			
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.

	csv 3	+	Name	Connection-1	i x	e.
4	Connection-1	5	Browse	Browse a CSV file	±	
	Excel	+	Load at Start	Yes No		•
	Data Service	+	FIELD SET CALC	JLATED FIELDS CONDITION		t≡
	Data Science Service	+				2
	Data Store	+	Fields not available !			Q

## 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.

CS	v 2	+	Name	Connection-1	i x	2
3	Connection-1 [C_1]	4	Browse	Browse a CSV file		$\bigcirc$
Exc	cel	+	Load at Start	Yes No		¢
Da	ata Service	+	FIELD SET CALCULAT	red Fields condition		t≡
Da	ata Science Service	+				Ø
Da	ata Store	+	Fields not available !			Q

- v) Configure the following information:
  - a. Name: Name the connection.
  - b. **Browse:** Click the '**Browse**' icon **1** to browse a CSV file.
  - c. Load at Start: Enable this option to get the updated data from the data source before loading it into charts.



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

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

## 6.1.1. Condition

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

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

## 6.1.2. Calculated Field

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

- i) Navigate to the Data Connectors page
- ii) Create a connection by selecting a specific Data Connector type
- iii) Connect to the desired data source to access the available fields
- iv) Click the 'CALCULATED 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

	Calculated Fie	ld Editor	×
1	Name	CalcField1	
2	Script Editor	{column2.sales}/2	
			11
c		nes in square brackets: <i>[total_sales]/[number_of_items]</i> iriable in curly braces: <i>{bar1.profit}*2+[profit_jan]</i>	
		3 Create Car	ncel

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

FIELD SET	CALCULATED FIELDS	CONDITION		
Calculated f	ields			+
CalcField	1		1	Î

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

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

- i) Navigate to the Data Connectors page.
- ii) Select a Data Connector type.
- iii) Create a new Connection and configure it.
- iv) Select the 'Script on Load'  $\stackrel{\text{\tiny CD}}{=}$  icon provided next to the connection.

CSV Script On I	load	Name	Connection-1	i x	2
Connection-1	Î	Browse	Browse a CSV file	±	
Excel	+	Load At Start	Yes No		¢
Data Service	+	FIELD SET CAL	CULATED FIELDS CONDITION		t≡
Predictive Service	+				Ð
Data Store	+	Fields not available	1		Q

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



COMPONENTS	CONNECTIONS		Script	×	2
		Q	1		
Connection-1	[C_1]	•			¢
	L J				t≡
					8
					Q
			Connection-1 Use Ctrl+Space for assistance or visit help section for SDK method de	tails	

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

COMPONENTS	CONNECTIONS	Script ① ×	< .	28
	Q	1		9
Dashboard	ø			•
				t≡
				8
				Q
		Dashboard Use Ctrl+Space for assistance or visit help section for SDK method details		

Note:

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

	🔒 Hom	ie (l	Intitled x +					± Help 8	<b>P</b>
COMPONENTS	CONNECTIONS		Please select an item from Compor	nents or Connecti	ons	pane	!!	<b>(</b> ) ×	2
		Q							
Connection-1	[C_1]								¢
	L J								t≡
									8
									Q

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



🖞 8D8: Decision Platform X 🔓 Dashbard Designer X 🗅 BitViz Dashboard Designer SDK 🗙 🕂	
← → C (	९ ☆ 🖰 :
👖 Apps 🗳 YUJAA: platform 🗋 BDB: Decision Platfor: 🍯 BDB: Decision Platfor:	
Scripting Help	Advanced Scripting
1. Auto Reload	±
Method : sdk autoReload()	
Arguments : Not required	
This method should be written on Filters/ Grids/ Charts. Those connections will be reloaded automatically which has the filter key in their condition	
2. Reload All Connections	±
Method : sdk.reloadAll()	
Arguments : Not required	
All connections will be reloaded	
3. Reload From List	±

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

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

## 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.

CSV	+	Name	Connection-1	() × 🖓
Excel 2	+	Browse	Browse an excel file	
Connection-1 [C_1]	3 🔳	Sheet Name		•
Data Service	4	Load At Start	Yes No	t≡
Data Science Service	+	FIELD SET	CALCULATED FIELDS CONDITION	8
Data Store	+			Q



- v) Configure the following information:
  - a. Name: Name the connection.
  - b. **Browse:** Click the '**Browse**' icon **1** to browse an Excel file.
  - c. Sheet Name: Select a specific sheet using the drop-down menu.
  - d. Load at Start: Enable this option to get the updated data from the data source before loading it into charts.
- vi) The 'FIELD SET' tab displays all the fields after establishing the data connection.

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

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

FIELD SET	CALCULATED FIELDS	CONDITION	
Fields	Condi	tions	Actions
Expense		•	
Revenue		•	
Year	2012	•	<b>~</b>

viii) Select the 'Script on Load'  $\stackrel{\Box}{\cong}$  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 ڬ 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.

Data Service	+
Connection-1 [C_1]	2 🗎
Data Science Service	+

- 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.

	Name	Connection-1	(j) ×
2	Data Connectors	BDB_hiring	G
3	Data Services	test04_hiringdata	G
4	Load at Start	Yes No	
5	Timely Refresh	Yes No	
6	Refresh Interval	5	Minute(s)
1	FIELD SET CALCULATED FI	elds condition	
	bill_start_date		
	candidate_id		
	comments		

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  $\bowtie$ .
- 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.



CSV	+
Excel	+
Data Service	+
Data Science Service	+
Connection-1 [ C_1 ]	8
Data Store	+
Data Sheet	+

- 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.

1 Name	Connection-1	(i) X
2 Data Science Workflows	Basic workflow	G
3 Load at Start	Yes No	
4 Timely Refresh	Yes No	
5 Refresh Interval	5	Minute(s)
FIELD SET CALCULATED FI	elds condition	1
Country		
lat		
lon		
PredictedValues1		

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'** <sup>+</sup> icon provided next to the **'Data Store'** connector.
- iii) A new connection gets created under the Data Store connector type.



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

- 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.

1 Name	Connection-1	() ×
2 Data Store	BatchDemo	G .
3 Load at Start	Yes No	
4 Timely Refresh	Yes No	
5 Refresh Interval	5	Minute(s)
FIELD SET CALCU	LATED FIELDS CONDITION	
monthly_salary		
skills		
source		

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.

Data Store	+
Data Sheet	+
Connection-1 [C_1]	2
Web Socket	+



- 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.

1 Name	Connection-1	(i) × 🛃
2 Data Sheet	Sample Data Sheet	Ç 🛢
3 Load at Start	Yes No	¢
4 Timely Refresh	Yes No	t≡
5 Refresh Interval	5 Minute	(s)
FIELD SET	CALCULATED FIELDS CONDITION	Q
America		
Asia		
Europe		
Year		

#### 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.

Data Sheet	+
Web Socket	<del>()</del>
Connection-1 [C_1]	2
Merged Data	+

- 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.



CSV	+	Name	Connection-1	í	×
Excel	+	URL	wss:// /websocket/ws		
Data Service	+	Load at Start	Yes No		
Data Science Service	+				
Data Store	+				
Data Sheet	+				
Web Socket	+				
Connection-1	Î				
Merged Data	+				

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.

CSV	+	Name	Connection-3			i) ×	2
Excel	+	Connection 1		Conservation 2		- 1	
Connection-1 [C_1]	Î	Connection-1 Asia	5 Equal	Connection-2 Expense	••••	×	¢
Connection-2 [C_2]	Î	Connection-1	C	7 MERGED FIELDS	CALCULATED FIELDS		t≡
Data Service	+/	Asia Europe		Asia		×	Ð
Data Science Service	4	North America Year		Europe		×	Q
Data Store	+ \			North America		×	
Data Sheet	+	Connection-2 Expense		Year		×	
Web Socket	+	Revenue Year		Expense		$\times$	
Merged Data	+	Teal		Revenue		×	
3 Connection-3 [C_3]	2 🗎						

#### Note:

- a. The users can remove the fields added to the merged data connection using the '**Remove**'  $\times$  icon.
- b. After clicking the 'Create Criteria' icon, the created criteria gets added to space.

Name	Connection-3	i
C_1.Asia==C_2.Expense		+

- 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.

	Calculated Fiel	d Editor	×
-1	Name	CalcField1	
	Script Editor		
a			11
		nes in square brackets: <i>[total_sales]/[number_of_items]</i> riable in curly braces: <i>{bar1.profit}*2+[profit_jan]</i>	
		Create	cel

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**'<sup>III</sup> icon.
- iv) A dialog box appears to assure the action.
- v) Click the 'Yes' option to delete the connection.



CSV	+	Name	Delete Connection X	
Excel	+			-
Data Service	+	Criteria	Do you want to delete this connection?	
Data Science Models	+			DS
Data Store	+	Select a conne		d
Web Socket	+		Yes No	
Connection-1 [C_1]			•	

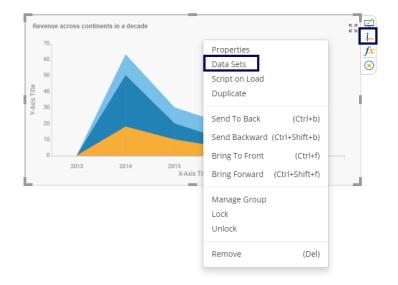
vi) The selected data connection gets deleted from the Data Connectors page.

## 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.



Area1	$\checkmark f_x \times$
	Connection-1 • C
Search	Category
Asia	Year
Europe	Series
NorthAmerica	Asia
Year	
3	Properties
3 Field Name :	Properties
Field Name : Display Name :	Asia
Field Name : Display Name :	Asia
Field Name : Display Name : Visible :	Asia
Field Name : Display Name : Visible : Color : Point Shape : Line Width :	Asia Asia 🗹
Field Name : Display Name : Visible : Color : Point Shape : Line Width : Line Type :	Asia Asia V Point V
Field Name : Display Name : Visible : Color : Point Shape : Line Width : Line Type : Point Radius :	Asia Asia V Point V 2
Field Name : Display Name : Visible : Color : Point Shape : Line Width : Line Type :	Asia Asia V Point V 2 Straight V

## 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.

Line2		4	fx	×
Connections	Connect	ion-1	۳	G
Search		Category	/	
Asia		Asia		
Europe		Series		
NorthAmerica		Year		
Year				
Proper	ties 2 Add new c	Indicato	r	
Proper	incs -		r	

- 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.



4	Conditio	×					
	Fixed value c	omparison					
	Field	Compared	l Field	Oper	ator	Compare To	Color
	Year	Year	-	==	•	1	
	2010					Create	Cancel

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

L	ine2	$\swarrow f_x \times$
	Connections Conne	ction-1 • C
	Search	Category
	Asia	Asia
	Europe	Series
	NorthAmerica	Year
	Year	
	Properties	Indicator
-	Conditions	+
	Year == 1	

# 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).

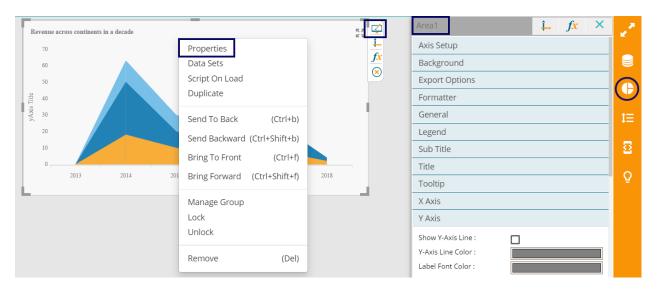


Search i	in compo	nents		Q	<b>III</b> ×	1
LI Charts	••••••••••••••••••••••••••••••••••••••				M Custom	
	<b>×</b>			•		C
Ar	ea	Ba	ar	Bubl	ble	t≡
Circur	mplex	Column		Funnel		8
Histo	Histogram		Funnel	<b>10</b>		Q
Reference and the second secon	Line		ap	Mito	Plot	
	Mixed		e	Project T	imeline	
			•	M	٨	

- 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 <u>https://bdb.ai/component-gallery</u> 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 **v** 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 <sup>I</sup> 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** B: 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 D**: 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.



Becision A Home Untitled x +			<b>±</b>		8	Ţ
Status of Projects Search	Q	\$ N	lanage (	Group	×	2
Objects (2)		Ø	Ô	Î		
Proj 3 Proj 2 Proj 2				Î		
Project 1				Î	ē	
						<b>P</b>
Analysis of Donald Trump's acceptance speech						2
						Q
NATION LAW HILLARY JOBS SAFE						

# 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:

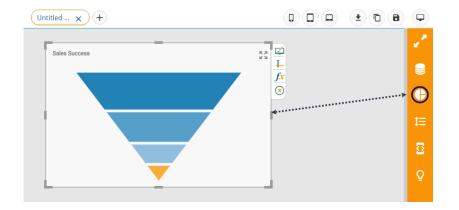
- a) Passing Default Values (Manual Filter)
- b) Performing Dynamic Filtering (through SDK methods)

#### 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)

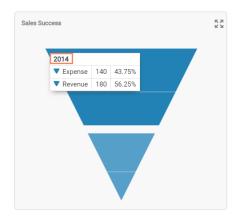


- ii) Connect an Excel data source of sales data. (Refer to section 7.2. for creating a data source connection using Excel File).
- iii) Click on the Funnel chart's data source connection and select the '**Condition**' tab and provide input as '**2014, 2015**' in the condition textbox (as shown below)



CSV	+	Name	Sales Data			i x	2
Excel	+	Browse		ents_18-07-2019.xlsx		<u>±</u>	
Sales Data [C_1]		Sheet Name	Column			•	•
Data Service	+	Load At Start	Yes	No			t≘
Predictive Service	+	FIELD SET	CALCULATED FIELDS	CONDITION			3
Data Store	+	Fields	Co	nditions	Actions		Q
Web Socket	+	Expense			• 🗆		
Merged Data	+	Revenue	_		• D		
		Year	20	14,2015	- 🗹		

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









# 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

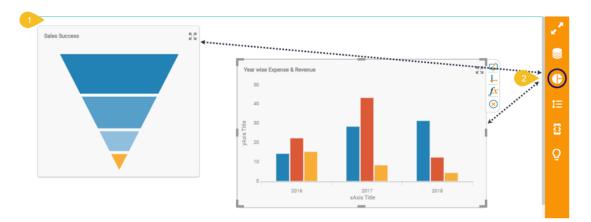
the

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).



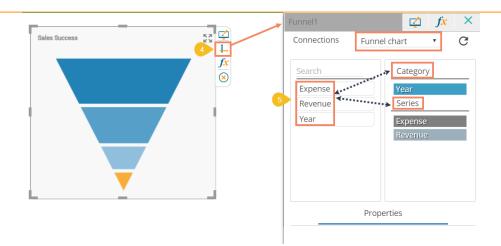
iii) Connect an Excel data source of sales data. (Refer to section 7.2. for creating a data source connection using Excel File).

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

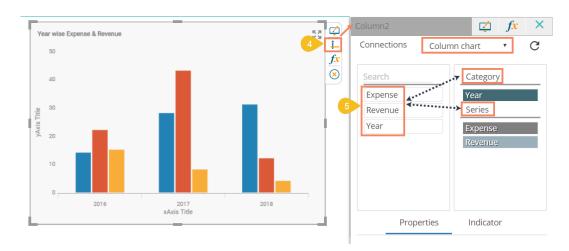
5V	+	Name	Column chart		×	2
ccel	+	Browse	DD Model Data.xlsx		t	
Funnel chart [C_1]	Î	Sheet Name	Column		•	¢
Column chart [C_2 ]	Î	Load At Start	Yes No			t≡
ata Service	+	FIELD SET	CALCULATED FIELDS CONDITION			8
redictive Service	+					Q
ata Store	+	Fields	Conditions	Actions		-
		Expense		• 🗆		
eb Socket	+	Revenue		• D		
erged Data	+	Year		•		
	cel Funnel chart [C_1] Column chart [C_2] 2 ta Service edictive Service ta Store eb Socket	cel     +       Funnel chart [C_1]     I       Column chart [C_2]     I       [C_2]     I       ta Service     +       edictive Service     +       ta Store     +       eb Socket     +	cel     +     Browse       Funnel chart [C_1]     I     Sheet Name       Column chart [C_2]     I     Load At Start       ta Service     +     FIELD SET     C       edictive Service     +     Fields     I       ta Store     +     Expense     I       eb Socket     +     Revenue     I	Name Column chart   cel +   Browse DD Model Data.xlsx   Funnel chart [C_1] i   Column chart Column   [C_2] i   ta Service +   + FIELD SET   calculated Fields Conditions   ta Store +   + Fields   eb Socket +   + Revenue	Name Column chart   cel +   Browse DD Model Data.xlsx   Funnel chart [C_1] •   Column chart Column   [C_2] •   ta Service +   Heldo Service +   Fieldo Service +   Fieldo Service +   Fieldo Service +   Expense -   Expense -   Revenue -	v +   Name Column chart   Funnel chart Column   [C_1] I   Browse DD Model Data.xlsx   sheet Name Column   Column chart Column   [C_2] I   Load At Start Yes   Ves No   Fields Conditions Actions Actions Expense Revenue Revenue In the second seco

- 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.

	COMPONENTS	CONNECTIONS				Script	Default field values	<u>(</u> )	×	2
			Q	8 1	sdk.autoReload();					
	Dashboard		\$							¢
7	Funnel1 [	[funnel1]	L 🗳							t≡
	Column2 [	column2 ]							6	3
										Q

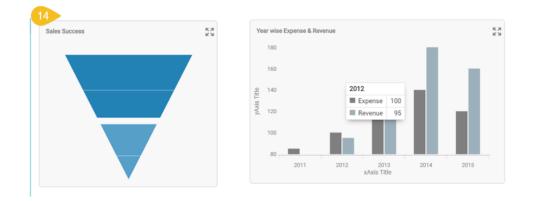
- ix) Select the 'Data Source' icon
- x) Select the data connection details displayed for the Column chart on the right side of the window.
- xi) Click the **'Condition'** option.



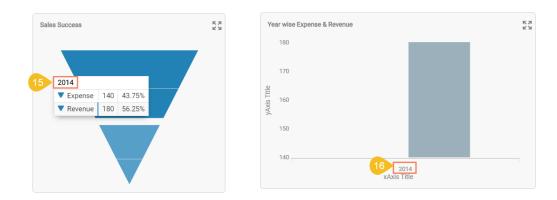
- xii) Select the field name using which filtering will be performed (E.g., In this case, using the **'Year'** field we are performing the drill-down action) and pass the condition that connects the Column chart with the Funnel chart (E.g., In this case, {funnel1.year} is used).
- xiii) Enable the 'Actions' checkbox. (as shown in the following image)

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

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.





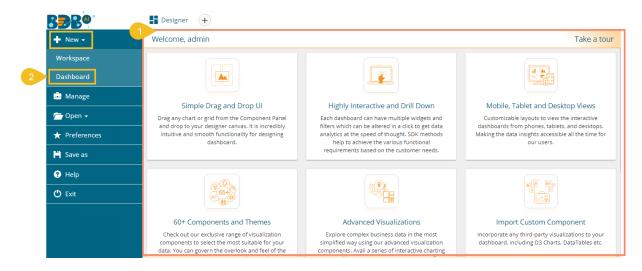
# 10. Scripting Window

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.
- 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.

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

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

	BER Decision Platform	🕇 Home	Untitled Dashb x +		± 🗊 🖯	<b>P</b>
	CSV	+	Name	Area	(j) ×	
	Excel	+	Browse	DD Components_18-07-2019.xlsx	<u>±</u>	
	Area [C_1]	2	Sheet Name	Area	•	¢
8	Column [C_2]	Î	Load At Start	Yes No		t≘
	Data Service	+	FIELD SET CALCULATED	D FIELDS CONDITION		Ø
	Predictive Service	+				Q
	Data Store	+	Asia			
	Web Socket	+	Europe			
	Merged Data	+	NorthAmerica			
			range			
			ser			

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





x) The script window for the Checkbox component opens.

COMPONENTS	CONNECTIONS		10 Script	Default field values (i) ×	2
		Q	1		
Dashboard					¢
Area2	[area2]				t≡
Column3	[ column3 ]				
Checkbox3	[ checkbox3	⊉			
					Q
			checkbox3 Use Ctrl	+Space for assistance or <u>visit help section</u> for SDK method details	

- 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 <sup>(i)</sup> or use '**Ctrl+Space'** keys to get the assistance in writing the script.

COMPONENTS	CONNECTIONS		Script	Default field values	12 🔘 🔅
		Q	11 1 if(changedItem.attributes.Value==1)		
Dashboard		⊉			
Area2	[area2]				
Column3	[ column3 ]				
Checkbox3	[ checkbox3	⊄			
			checkbox3 Use Ctrl+Sp	ace or assistance or visit help section for	SDK method details

d. The 'Designer Scripting Help' window opens.

13	Scripting Help Advanced Scripting
. Auto Reload	±
Method : sdk.autoReload() Arguments : Not required This method should be written on Filters/ Grids/ Charts. Those connections will be reloaded automa	tically which has the filter key in their condition
2. Reload All Connections	
2. Reload All Connections Method : sdk.reloadAll()	
	±



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

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

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

COMPONENTS	CONNECTIONS		 Script	Default field values	Ð	×
		Q	if(changedItem.attributes.Value==1) {     {         sdk.hideComponent(['area2']);     } }			
Dashboard		\$	<pre>sdk.showComponent(['column3']); }</pre>			
Area2	[ area2 ]		1			
Column3	[ column3 ]					
Checkbox3	[ checkbox3	⊉				
			Checkbox3 Use C	Ctrl+Space for assistance or <b>visit help section f</b> or SDK method o	letail:	5

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:



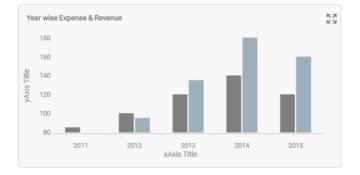
COMPONENTS	5 CONNECTIONS		Script Default field values	i	×
Dashboard		Q 2	<pre>1 if(changedItem.attributes.Value==1) 2 { 3 sdk.hideComponent(['area2']); 4 sdk.hideComponent(['area2']); </pre>		
Area2	[ area2 ]	÷	<pre>4 sdk.showComponent(['column3']); 5 } 6 else 7 {</pre>		
Column3	[ column3 ]	1	<pre>8 sdk.showComponent(['area2']); 9 sdk.hideComponent(['column3']); 10 }</pre>		
Checkbox3	[ checkbox3	4	- · · · · ·		
			checkbox3 Use Ctrl+Space for assistance or visit help section for SDK met	thod deta	ils

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



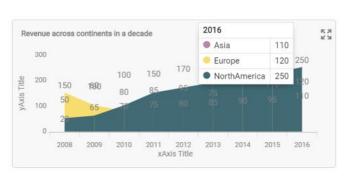
xiii) In the below screen capture, since the '**Checkbox**' is checked, the '**Column chart**' is displayed.





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

Label





# **11.** Managing Options for a Dashboard

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

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

The created and saved dashboards can be shared among the users for a purpose. There are options provided to move and publish dashboards.

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

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

	Decision Platform	esigner							
	+ New - 2	Workspaces (2) ①	c 🧧		Dashboards (14)				Q
1	🚊 Manage	All Dashboards			Text Analyzer	F.	0		:
	🗁 Open 👻 💦 3	Workspace1	/ 1	ī	Untitled Dashboard	F.	0	Î	:
	★ Preferences	Campaign Analytics	~	5	Sample Dashboard 6	ſ.	0	ĩ	:
	H Save as							_	
	🔋 Help	Trash	Ē	I	Snap shots	£.	0		-
	🖒 Exit				Data lable -overlapp	ſ1	0	Î	÷
					Group Bar	(f)	٥	Î	÷
					Map chart	ſ	0	Î	÷
					filter_saver	(†)	0	Î	÷
						_	-	-	

### Options provided to a Dashboard:

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

#### Explaining the Actions Menu:

Option	Name	Description
	Preview	Opens preview for the selected dashboard



<b>±</b>	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.

	🕂 New 🗸	Workspaces (3)	Ð	G	Q	Dashboards (3)					Q
1	🚔 Manage	All Dashboards				Copy_Of_Hide and Show	$\uparrow$	ſ.	٥	Î	:
	🗁 Open 🚽	Finance		1	13	Hide_Show Functionality	^ 4	(1)	0	Î	:
	★ Preferences	Montes and			_		•	_	•	-	
	💾 Save as	Workspace1		-	•	new copy Campaign Analytics	Υ	ET.	0	•	•
	Help	Campaign Analytics		1	1						
	🖒 Exit	Trash			×						

v) The selected dashboard opens in the designer workspace.

	A Home	5 Hide_Show Funct X	
			<i>J</i> ∧ ⊗
early sales and expens	e Sales		2
5	17	Expense 17	Year wise Expense & Revenue
6	16	16	2016
7	-14	14	
В	13	13	40 2017
9	11	23	AAC
0	20	31	2018
			0 5 10 15 20 25 30 35 40 45 xAxis Title

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.

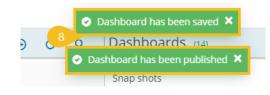
- i) Click the 'Manage' option on the Designer homepage.
- ii) Select and click on a workspace from the list of Workspaces.
- iii) Select a Dashboard from the list of the saved dashboards under the selected workspace.
- iv) Click the '**Publish to Portal**' 🏠 icon.

	+ New -	Workspaces (2)	Ð	C	۹	Dashboards (14)				Q
1	🚊 Manage	All Dashboards			Group Bar	<b>F</b>	0	Î	÷	
	🚰 Open 🗝	Workspace1		/	3	Map chart	4 FJ		Î	:
	★ Preferences	Campaign Analytics				filter_saver	ſ.	0	Î	:
	H Save as			-	-	Filter saver	(f)	•		
	Help	Trash			×			_	-	-
	🖒 Exit					Data Drill	£.	•		:

- 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.

Publish		×
Name	Data lable _overlapping test	
Description	Published from dashboard designer	
USER LIST	USER GROUPS EXCLUDE USER	
Search		
UserGroup		6
Kpmg Group		
testUserGrou	þ	
	7 Publish	Cancel

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



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



Decision Platform		
My Documents 🗲		
Shared Documents	filter_saver 9	Data lable _overlapping test

Note: For the published dashboard, the below given dialog box appears while clicking the '**Publish to Portal**' **(** 

- 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.

Publish			×
Name	Hide and Show		
Description	Published from da	shboard designer	//
Action	Re-publish	O Publish As N	
Versions	Hide and Show Feb 1, 2019 5:		
	Hide and Show Apr 4, 2019 12		
USER LIST	USER GROUPS	EXCLUDE USER	
Search			
Will			
-			
		Publish	Cancel

### **11.3.** Deleting a Dashboard

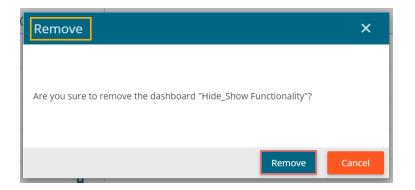
Users can delete a dashboard by following the steps explained over here.

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



	+ New -	Workspaces (3)	Ð	с	۹	Dashboards (3)					۹
1	📫 Manage	All Dashboards				Copy_Of_Hide and Show	$\uparrow$	Ŧ.	٥	ĩ	:
	🗁 Open 🗸	Finance		1	13	Hide_Show Functionality	$\uparrow$	F.	0	4	:
	★ Preferences	Workspace1				new copy Campaign Analytics	<b>^</b>	<b>F</b>	•		:
	💾 Save as				-	new copy campagn analysics			-	-	
	Help	Campaign Analytics		1	1						
	🖒 Exit	Trash			×						

- 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.

Designer			📀 Da	shboard has been deleted 🗙					
Workspaces (3)	Ð	с	Q	Dashboards (2)					C
All Dashboards				Copy_Of_Hide and Show	$\uparrow$	(f)	•	î	:
Finance				new copy Campaign Analytics	$\mathbf{\uparrow}$	F	•		:
Workspace1		-	-						
workspacer			•						
Campaign Analytics		1	Î						
Trash			×						
	Workspaces (3) All Dashboards Finance Workspace1 Campaign Analytics	Workspaces (3)  All Dashboards Finance Workspace1 Campaign Analytics	Workspaces (3)	Workspaces (a)  C  Q All Dashboards Finance Workspace1 Campaign Analytics	Workspaces (3)     (2)     Q     Dashboards (2)       All Dashboards     Copy_Of_Hide and Show       Finance     (2)     (2)       Workspace1     (2)     (2)       Campaign Analytics     (3)	Workspaces (3)       (2)       (2)       Dashboard is been deleted is         All Dashboards       Copy_Of_Hide and Show       ^         Finance       / 1       new copy Campaign Analytics       ^         Workspace1       / 1       1         Campaign Analytics       / 1       1	Workspaces (3)       (2)       Q       Dashboards (2)         All Dashboards       Copy_OL_Hide and Show       1         Finance       (2)       new copy Campaign Analytics       1         Workspace1       (2)       (2)         Campaign Analytics       (2)       (2)	Workspaces (3)       (2)       Q       Dashboard is been deleted A         All Dashboards       copy_of_Hide and Show       (1)       (1)         Finance       (2)       (1)       (1)       (1)         Workspace1       (2)       (1)       (1)       (1)         Campaign Analytics       (2)       (1)       (1)       (1)	Workspaces (3)       (2)       Dashboard in as been deleted A         All Dashboards       Copy_Of_Hide and Show       (1)       (1)         Finance       (2)       (1)       (1)       (1)         Workspace1       (2)       (1)       (2)       (1)         Campaign Analytics       (1)       (1)       (1)       (1)

### **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**'<sup>2</sup> icon.

	BBB®	Designer					
	+ New -	Workspaces (3)	Ð	G	۹	Dashboards (3)	Q
1	🚔 Manage	All Dashboards				Hide_Show Functionality	
	🗁 Open 👻	Finance		1		Untitled Dashboard	
	★ Preferences	Workspace1			-	Sample Workspace	-
	💾 Save as	Workspacer		1	Î		-
	Help	Campaign Analytics		1	Î		
	🖒 Exit 🗧	Trash					



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

Restore			×
Workspace	Campaign Analytics		O
N		Restore	Cancel

v) A success message appears to assure the restoration.



vi) The dashboard gets restored to the selected workspace.

+ New -	Workspaces (3)	Ð	C	۹	Dashboards (3)					۹
📥 Manage	All Dashboards				Copy_Of_Hide and Show	↑	f.	6	Î	:
🗁 Open 🗸	Finance		/		Hide_Show Functionality	$\uparrow$	(†	•	Î	:
★ Preferences	Workspace1			î	new copy Campaign Analytics	1	F	•		:
💾 Save as	· · · · · · · · · · · · · · · · · · ·		1	•			-			
Help	Campaign Analytics		1	Î						
🖒 Exit	Trash			Î						

### 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.

+ New -	Workspaces (3)	$\oplus$	c	۹	Dashboards (15)					C
🚔 Manage	All Dashboards				Shap shots	11	LTJ		•	•
🚰 Open 🗸	Finance			-	Data lable -overlapping test	↑	F	٥	Î	1
★ Preferences			1		Group Bar	$\uparrow$	Ð	٥	Î	1
💾 Save as	Workspace1		1	1	Map chart	$\uparrow$	F	•	ĩ	
Help	Campaign Analytics		1	Î	filter_saver	^	Ţ.	•	î	:
😃 Exit	Trash			Ē	Eilter cover	•		^	-	
					Filter saver	Ŷ	(f)	•		C

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

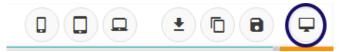


Preview	Ţ
Export To Local Disk	<u>+</u>
Rename	/
Move To	

iv) The selected dashboard opens in the Preview mode.

				Save Filter	select filter
Year wise Expense & Revenue	К.Я. И И	Revenue across continents in a decade	К.Я. 2 У	co	ountry
USA		6,000		USA	
USA		91L 00			state
USA		2000		California	
USAUSA		-2.000 California California California California California xAxis Title			city
USA USA		GDP Ranking (2018) of the top 10 countries	К.Я. 2 У	Search	
				🔲 San Jose	
USA				San Franscis	co
USA USA				🕑 San Diego	
USA		San Diego		🔲 Santa Clara	
USA USA		12 -500		🔲 Buffalo	
USA		1,431,413		NY City	

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.

+ New -	Workspaces (3)	Ð	C	۹	Dashboards (15)					Q
🚔 Manage	All Dashboards				Report Burst	$\uparrow$	ET.	•	î	:
🗁 Open 👻	Finance		1		Text Analyzer	$\uparrow$	F	•		
★ Preferences	Workspace1				Untitled Dashboard	1	(†)	•		;
H Save as	Campaign Analytics		-		Sample Dashboard	•	Preview			
? Help						2	Export	to Local D	)isk	±
🖒 Exit	Trash			×	Snap shots	2	<u> </u>		/ISK	
					Data lable -overlapping test	1	Rename	9		
					Group Bar	1	Move to	D		*

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



$\leftarrow$ $\rightarrow$ $\checkmark$ $\uparrow$	$\overline{\mathbf{h}}$	> This PC > Downloads $~~$	$C$ $\sim$ Search Downloads
✓ ★ Quick access		✓ Today (1)	
E Desktop	*	Sample Dashboard.bvzx Type: BVZX File	Date modified: 15-12-2021 18:41 Size: 16.3 KB
🛓 Downloads	*	> Last month (12)	
Documents	*	> Earlier this year (182)	
<b>Pictures</b>	*		

#### 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.

+ New -	Workspaces (3)	$\oplus$	C	۹	Dashboards (3)			۹
🚔 Manage	All Dashboards				Copy_Of_Hide and Show	↑	🖬 🛆 🔋	
🗁 Open 👻	Finance		/	10	Hide_Show	$\uparrow$	Preview	Ţ
★ Preferences	Workspace1				new copy Campaign Analytics	<b>^</b>	Export to Local Disk	+
💾 Save as				-		2	Rename	
Help	Campaign Analytics		/	Î			Move to	-
😃 Exit	Trash			×			MOVE LO	<b>*</b>

- 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.

BBB®	Designer +		6	O Das	hboard has been renamed 🗙					
+ New -	Workspaces (3)	Ð	c	Q	Dashboards (3)					C
🚔 Manage	All Dashboards				Copy_Of_Hide and Show	$\uparrow$	(fi)	•	1	:
🗁 Open 🗸	Finance			1	Hide and Show functionality	$\uparrow$	F	•		:
★ Preferences	Workspace1		-	-	new copy Campaign Analytics	1	F	0		
💾 Save as			1	-	new copy campaign Analytics	.1.	653			•
Help	Campaign Analytics		1	1						
🖒 Exit	Trash			×						



## 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**' <sup>III</sup> icon from the '**More Actions**' context menu.

+ New -	Workspaces (3)	Ð	C	۹	Dashboards (3)			۹
🚊 Manage	All Dashboards				Copy_Of_Hide and Show	$\uparrow$	n 🛆 î	÷
🗁 Open 👻	Finance		1	-	Hide and Show functionality	$\uparrow$	Preview	
★ Preferences	Workspace1			_	nau sanu Campaign Analutica	<b></b>	Export to Local Disk	+
💾 Save as	workspace			Î	new copy Campaign Analytics	т		
? Help	Campaign Analytics		1	Î			Rename	-
🖒 Exit	Trash					2	Move to	

- 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.

3 Move to An	other Workspace		×
Workspace	Finance		4
		5 Move	Cancel

vi) A success message appears.

BBB®	Designer +		6	📀 Da	shboard has been moved 🗙					
🕂 New 🗸	Workspaces (3)	Ð	С	Q	Dashboards (2)					Q
🚔 Manage	All Dashboards				Copy_Of_Hide and Show	$\uparrow$	F	0	Î	:
🗁 Open 🗸	Finance		1	î	new copy Campaign Analytics	<b>^</b>	F	0	Ē	
★ Preferences	Workspace1									
🎽 Save as				-						
Help	Campaign Analytics		-	1						
🖒 Exit	Trash									

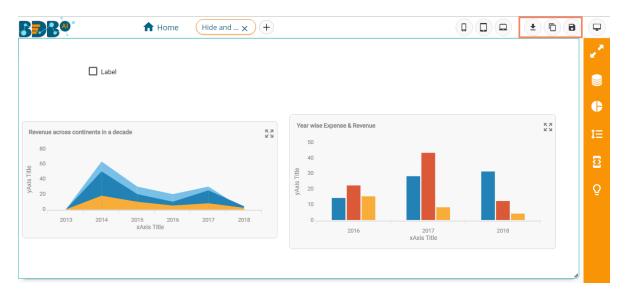
vii) The dashboard gets moved to the selected Workspace.

+ New -	Workspaces (3)	$\oplus$	C	Q	Dashboards (3)					Q
🚔 Manage	All Dashboards				demo	^	T.	•	Î	:
🗁 Open 🗸	Finance		1	Î	Finance Overview	$\uparrow$	T.	•	Î	÷
★ Preferences	Workspace1			. (	Hide and Show functionality	↑	Ŧ	•		:
💾 Save as				-				-	-	
Help	Campaign Analytics		1	Î						
😃 Exit	Trash			×						



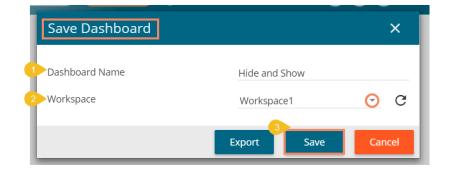
# 12. Saving a Dashboard

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.

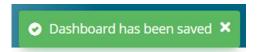


### 12.1. Save

- 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.



Workspaces (3)	Ð	C	Q	Dashboards (16)					Q
All Dashboards				Hide and Show	$\uparrow$	F	6	Î	:
Finance		1	Î	Report Burst	$\uparrow$	(†)	۵	Î	÷
Workspace1		1	Î	Text Analyzer	$\uparrow$	ft	٥	Î	:
Campaign Analytics		/	Î	Untitled Dashboard	$\uparrow$	F	6	Î	:
Trash			×	Sample Dashboard	$\uparrow$	F	6	Î	:

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.

Workspaces (3)	Ð	С	۹	Dashboards (2)					۹
All Dashboards				Copy_Of_Hide and Show	$\uparrow$	æ	•	Î	:
Finance		1	Î	new copy Campaign Analytics	↑	Ţ.	٥	Î	:
Workspace1		1	ĩ						
Campaign Analytics		1							
Trash			×						

### 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 Porta**l' option from the list of Dashboards.

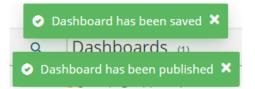
BBB®	Designer +							
🕂 New -	Workspaces (1)	⊕ C	Q	Dashboards (1)				Q
📫 Manage	All Dashboards			Dashboard	↑	F		:
🚰 Open 👻	Untitled Workspace		1					
★ Preferences	Territ							
💾 Save as	Trash		×					
Help								
😃 Exit								

- 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.



Publish			×
Name	Dashboard		
Description	Published fron	n dashboard designer	h.
USER LIST	USER GROUPS	EXCLUDE USER	
Search			
Adminuser admin.user@bo	db.ai		<u>~</u>
Abinash abinash.achary	a@bdb.ai		
Peyush Gaut peyush.gautar			
		Publish	Cancel

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**.'

BBR <sup>®</sup>						۹ :	128 L	?
My Documents					Search Documer	nts Q Sort by : Cus	tom 🗸	÷ (+
		€ <sup>6</sup> 885⊾			<b>€</b> %%			
Shared Documents	Sample Folder	Story X 32 views	Filter Saver Da 6 views	Documents	Story N 1 view	Dashboard 0 views		

#### • 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.

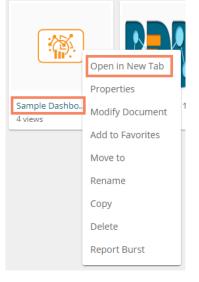


	Open in New Tab	2
l i fi	Properties	
	Modify Document	
Dashboard	Add to Favorites	
4 views	Move to	l
	Rename	
	Сору	
	Delete	
	Report Burst	

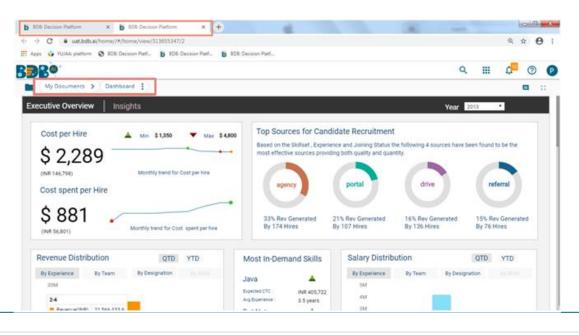
## 13.1. Open in New Tab

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.

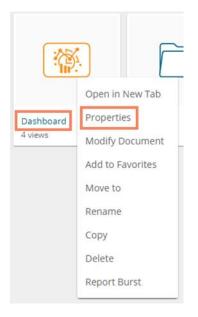




## 13.2. Properties

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**'  $\Box$  icon to copy the open document link of the published Dashboard.
    - 3. Click the 'Save' option to save the update.

Properties	×
Dashboard     Properties     Sha	are with User Share with Group Exclude Users
Created by:	Adminuser
Туре:	Governed Dashboard
Version:	6.0.0
Where:	My Documents
Created:	Fri Mar 12 2021 14:58:11 GMT+05:30 (India Standard Time)
Modified:	Fri Mar 12 2021 14:58:11 GMT+05:30 (India Standard Time)
Description:	Published from dashboard designer
Upload Image: Bro	wse
Open document link:	https://app.bdb.al/home/#/opendocument?data=eyJ1c2VyIjoi
	Close Save

- **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.

	Document privilege has			Search
Properties				×
• Dashboard	<b></b>	a	PS 91075 107	
Properties Search ad	Share with User	Share with Group	Exclude Users	1/70
datapreadmin Automation_Dat	1 taprep_Admin@bdb.ai		3	
	aprep_nonini@ouo.ar			2
			- 4	-
			Close	Save

- 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.

Properties Document privilege has been updated successfully	×
Dashboard	
Properties Share with Us     Share with Group	Exclude >
Search Q	2/826
15 july 2	
AdminPermissionTest	3 🗹
All Permission Group Test	
Anuj	
Anuj_gupta	
Archanagrp	
bdb	
с	4 Save

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).

5			Search
Properties			×
Dashboard			
Properties	Share with User	Share with Group 1	Exclude Users
Search tes	۹	]	1/24
			4 Close Save

#### 13.2.1. Report Burst

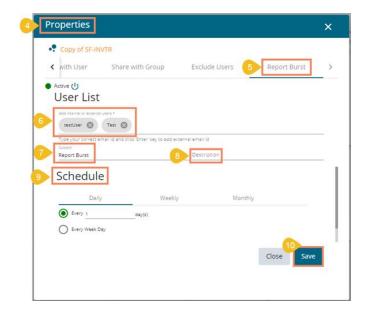
The Report Burst operation allows the user to share the open document link of a Dashboard to another user(s). The feature appears under the **Properties** option provided for a story created or shared under the **'Public Documents**' space.

- 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.



	Public Document	5 >
	<u>ه</u>	
	2dec19nlp 0 views	BDB SAMPLES
	<b>*</b>	Open in New Tab
0	Copy of SF-INVTR 2 views	Modify Document Add to Favorites
		Rename Copy

- 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.

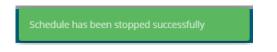
pdated successfully

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



roperties				×
Copy of SF-INVTR				
<b>k</b> with User Sh	are with Group	Exclude Users	Report Burst	>
Activ				
Stop Schedule				
sestUser 🕲 Test	0			_
Suter:	nd click "Enter' key to add exte			
Report Burst		Description		
Schedule				
Daily	Weekly	Monthly	,	
Every 1	day(z)			
O Every Week Day				
			_	
			Close Save	

xiv) A notification message appears to inform the same.

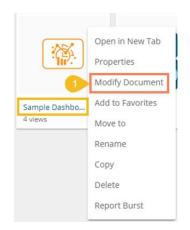


xv) The open doc link of the selected dashboard gets shared to the selected user at the scheduled time through the mail.

## 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.

	Modify Dashboard	Search Docum	
	Modify Dashboard		×
2	Sample Dashboard	3 Description Published from dashboard designer	11
	Select Dashboard Choose Files	No file chosen	
100	+ Add User Properties	+ Add System Properties	
5	Parameter Name	Parameter Value	×
	Parameter Name	Select System Properties 👻	×
T		Close 6	Save
I.			

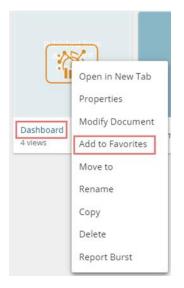
viii) A confirmation message appears to assure that the required data got updated.

My Documents			Dashboard	d has been up	dated successfully	ŀ
		)	<b>▲</b> &%	ß		
Shared Documents	Documents		Story 0 views	~	Sample Dashboard 0 views	÷

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

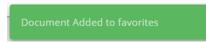
Administrators can add a dashboard to or remove it from the 'Favorites' section.

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.

Favorites >	
Documents	Sample Dashboard

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

Favorites >		
		in New Tab
	Remo	ove from Favorites
Dashboard 4 views	•	Documents

#### OR

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



_	
1	Open in New Tab
	Properties
Deebbeerd	Modify Document
Dashboard 0 views	Remove from Favorites
	Move to
	Rename
	Сору
	Delete
	Report Burst

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

BBB®	
Favorites >	Document removed from favorites
Documents 🗖	

# 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.



	Open in New Tab
	Properties
	Modify Document
Dashboard 4 views	Add to Favorites
	Move to
	Rename
	Сору
	Delete
	Report Burst

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

Move to			×
My Document	5		
Search			
Docum	ents		>
			_
			- 1
			- 1
			- 1
			- 1
		Close	Save
			_

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

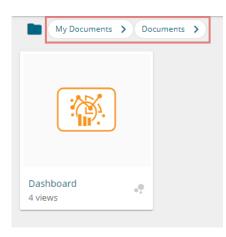


Move to		×
← Documents		
Search		
	Close	Save
		Jave

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.



	_
	Open in New Tab
	Properties
	Modify Document
Sample Dashbo	Add to Favorites
4 views	Move to
	Rename
	Сору
	Delete
	Report Burst

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

Rename	×
New Name * Dashboard	
	Close Save

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

BBB®				6 W			Q
My Documents >		Document				Search Documents Q	Sort by
		<b>₩</b> 8%	? B				]
Shared Documents	Sample Folder	Story 31 views	~	Dashboard 4 views	••	Documents	

#### **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.



	Open in New Tab	Ì
	Properties	t
	Modify Document	
Dashboard 4 views	Add to Favorites	
	Move to	t
	Rename	
	Сору	
	Delete	
	Report Burst	

- 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.

My Documents >				Search Documents Q Sort by: Custom 👻
		<b>کری ای</b>		
Shared Documents	Sample Folder	Story N 31 views	Dashboard 4 views	P Documents
			Create New Folder Link a URL Paste Create New Story	

- 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.

Paste	×	
Name * Copy of Dashboard		
	Close Save	

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



BBB®				Q	III 🗘 🖗 🕢
My Documents >				Search Documents Q Sort by	r: Custom 🗸 \Xi 🕀
		€ 6665 1000 1000 1000 1000 1000 1000 1000			
Shared Documents	Sample Folder	Story N 31 views	Dashboard 4 views	Documents	Copy of Dashboard 4 views

## **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.

Delete	V	×
Do you want to delete selecte	d document	?
	Close	Delete

v) A success message appears.

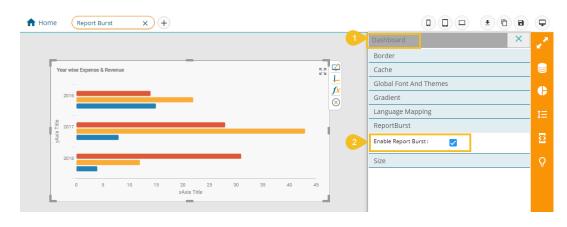


vi) The selected dashboard gets deleted.

#### 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.

BBB®®	Designer						
+ New -	Workspaces (3)	⊕ C	Q	Dashboards (15)			Q
🚔 Manage	All Dashboards			Report Burst	<b>□</b> <sup>3</sup>	î	÷
🪈 Open 🗸	Finance			Text Analyzer		Î	
★ Preferences	Workspace1			Untitled Dashboard	<b>a</b>	î	÷
<ul> <li>Save as</li> <li>Help</li> </ul>	Campaign Analytics		Î	Sample Dashboard	<b>a</b>	Î	:
() Exit	Trash		Î	Snap shots		Î	÷

- 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.

Publish			×
Name	Report Burst		
Description	Published from d	ashboard designer	1.
USER LIST	USER GROUPS	EXCLUDE USER	
testu			×
migTestUser testRestscript@			
migTestUser testRestscript@			
testUser testUser@bdb	ai	(	4
		5 Publish	Cancel

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

BBB®						
My Documents >					s	earch Documents Q
	<b>BBR</b> O'					Open in New Tab
Shared Documents	Copy of Sample	Folders	New Folder	Published Dash	Report Burst 0 views	Properties Modify Document
€%% <b>⊾</b>	୶ୡୢୄୄୄୄ୶					Add to Favorites Move to Rename Copy
Story N 22 views	Story N 10 views				7	Delete Report Burst

- 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.

8 Report Burst			×
Subject	William Martin 🕲	cription	
12 Schedule Daily	Weekly	Monthly	
Every 1     Every Week Day	day(t)		
Start time 15	▼: <u>57</u> ▼	C	13 Iose Save

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

Report	÷Ċ.
Projectadmin@bdb.ai To: • prakash.josh@bdbizviz.com	Today at 3:58 PM
It     Prakata foor imposed kite Count       Report Burst, pdf       Q     Download All     Imposed All	
Hello Prakash,	
Click on the below link to open report	
dick here	
Reach out to us at <u>support@bdbizviz.com</u> for your queries and suggestions.	
Thank you, Team BDB	

## **13.10.** Insert Comments

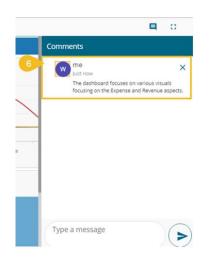
The comment option is provided for the published Forms to explain or insert feedback for the form.

- 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.

1 My Documents > Riter Saver Dashboard		2 💷 🜼
		Comments
Year wise Expense & Revenue	ちょう イン イン 日 Revenue across continents in a decade	
USA USA USA USA USA USA USA USA USA USA	6,000 4,000 0 -2,000 California California California California California California California California California	Callo
01. 00A	5an Jose 12 3.678 2.641.51	Sen Jose 4.4.7 Type a message



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 C / Reduce Size c icon is provided to view the form in full screen or reduce the form screen size.

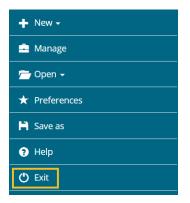
# 14. Signing Out

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



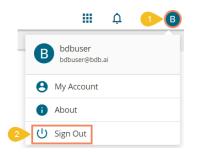
6	BDB:	Decis	ion Platform	×	< b	BDB: Decisio	n Plat	form 🗙	+	
$\leftarrow$	$\rightarrow$	C	app.bdb.a	ai/des	igner/v	riews/design	er/d	esignhome.html		
	Apps	ŷ	YUJAA: platform	<b>S</b> I	BDB: Dec	cision Platf	6	BDB: Decision Platf.	. 6	BDB
ß		ß	Al			Desig	gnei	r		

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.

'n	Leave site?		
:it	Changes you made may not be saved.		
		Leave	Cancel

## 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.

<b>B</b> •			९ 🎹 🗘 🥶 🕐
My Documents			Administration User admin.user@bdb.ai
Welcome to BDB Decision platform	Dashboard Designer	Business Story	My Account
BDB is a complete decision platform for all your business needs. Drive from data to dynamic visuals and derive an actionable insight into your business data. Avail 360° view	Design, save and publish a splendid governed dashboards. Display relevant KPIs through comprehensive and stunning visual reports to attain your business objectives.	Go beyond the classic BI with our ground-breaking self-service BI tool. Gain pertinent insights into your business by creating wide-ranging views on your own without external IT help.	About     Sign Out     your next ousiness move: Access an     apply accurate and customizable     Predictive models to maximize futu     opportunities.
of your business by assembling, processing, and analyzing the acquired data. Access incomparable analytics at any time from anywhere on any device.	Data Center	© ETL	Data Preparation
uevice.	Supports a wide range of Data sources starting from the spreadsheets in your system to a cloud-based database.	A self-driven Data Wrangling tool to extract data from diverse sources, including the merged data. Enforce	Experience a secure yet self-driver mode of data preparation. Streamlin the entire process of dealing with
Version: 6.5.0 Released on: Sep 30, 03:28	Establish connections to these data sources and build Data Sets or Data Stores to enable rich business	data quality and consistency standards to deliver the output in a presentation- ready format.	retrievable business data empoweri the business users to decide with unprecedented agility.



#### 14.1. Forgot Password Option

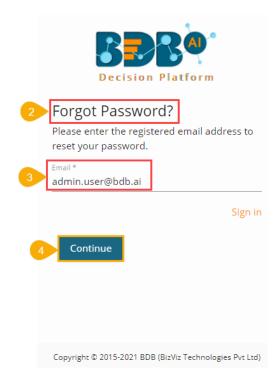
The users are provided with a choice to change the password on the Login page of the platform.

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

Decision Platform	
Email / User Id *	
• Password *	
Auth Type Enterprise	
Sign In	

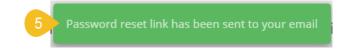
Copyright © 2015-2021 BDB (BizViz Technologies Pvt Ltd)

- 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.

This email is sent in response to your request for a password reset.



Click on the below link to reset your Password

Reset Password

If you feel you have received this email in error or have any questions, please contact us at <a href="mailto:support@bdbizviz.com">support@bdbizviz.com</a>

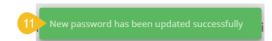
Thanks And Regards, Support Team

- 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.

R	eset Password
	ou have confirmed ownership of the BDB account ease reset your password to get access.
-	w Password *
•••	
-	
_	nfirm New Password *

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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 4<sup>th</sup> session, a warning message

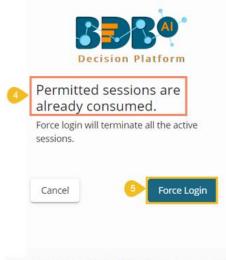


displays to inform that the user has consumed the permitted sessions and, a click on the 'Force Login' would kill all those active sessions.

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



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- 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.