

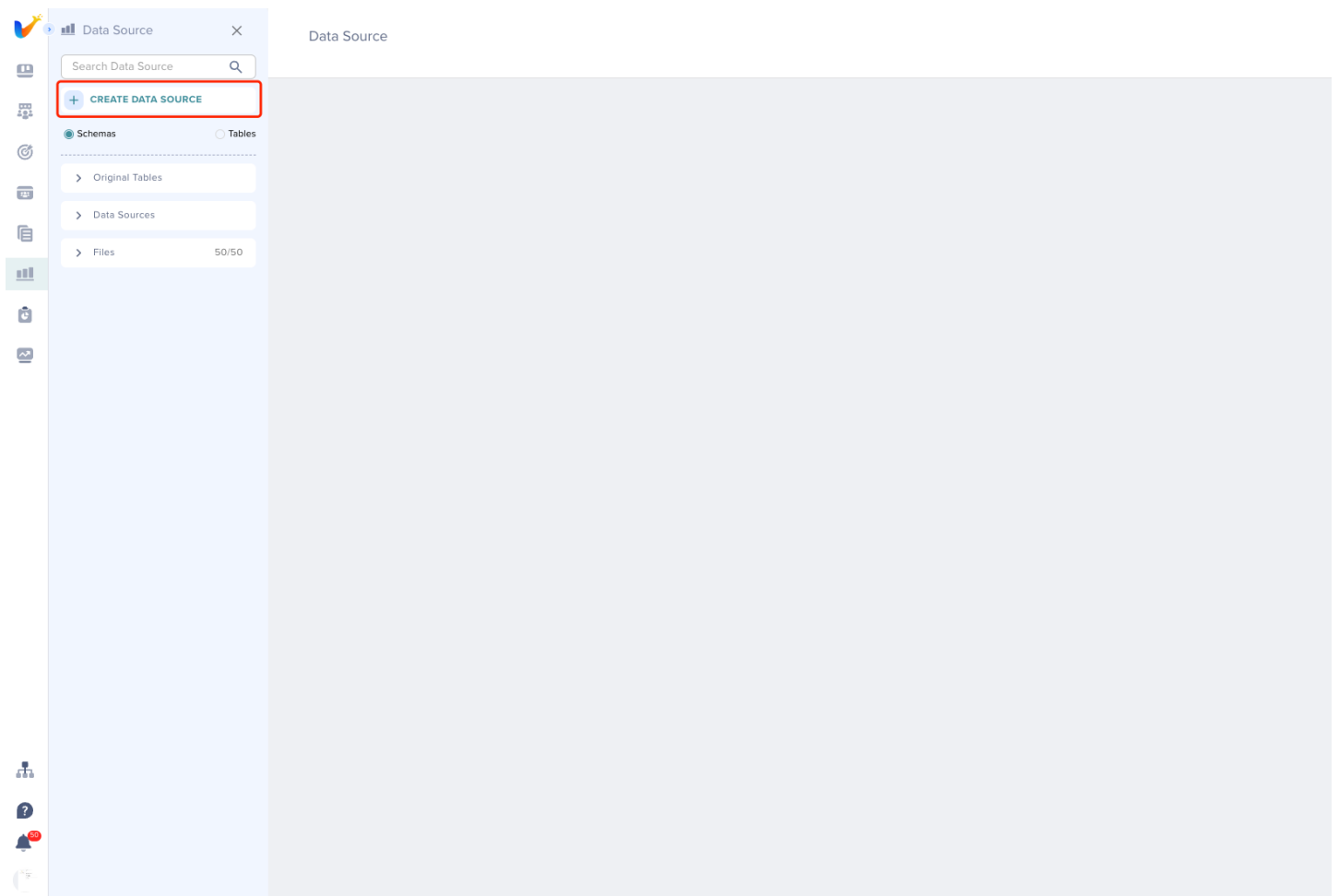
# BI Product Overview

## Overview

Based on various data, create a custom dashboard composed of a variety of charts and widgets for data display and analysis, and share it with users who need it for editing and viewing.

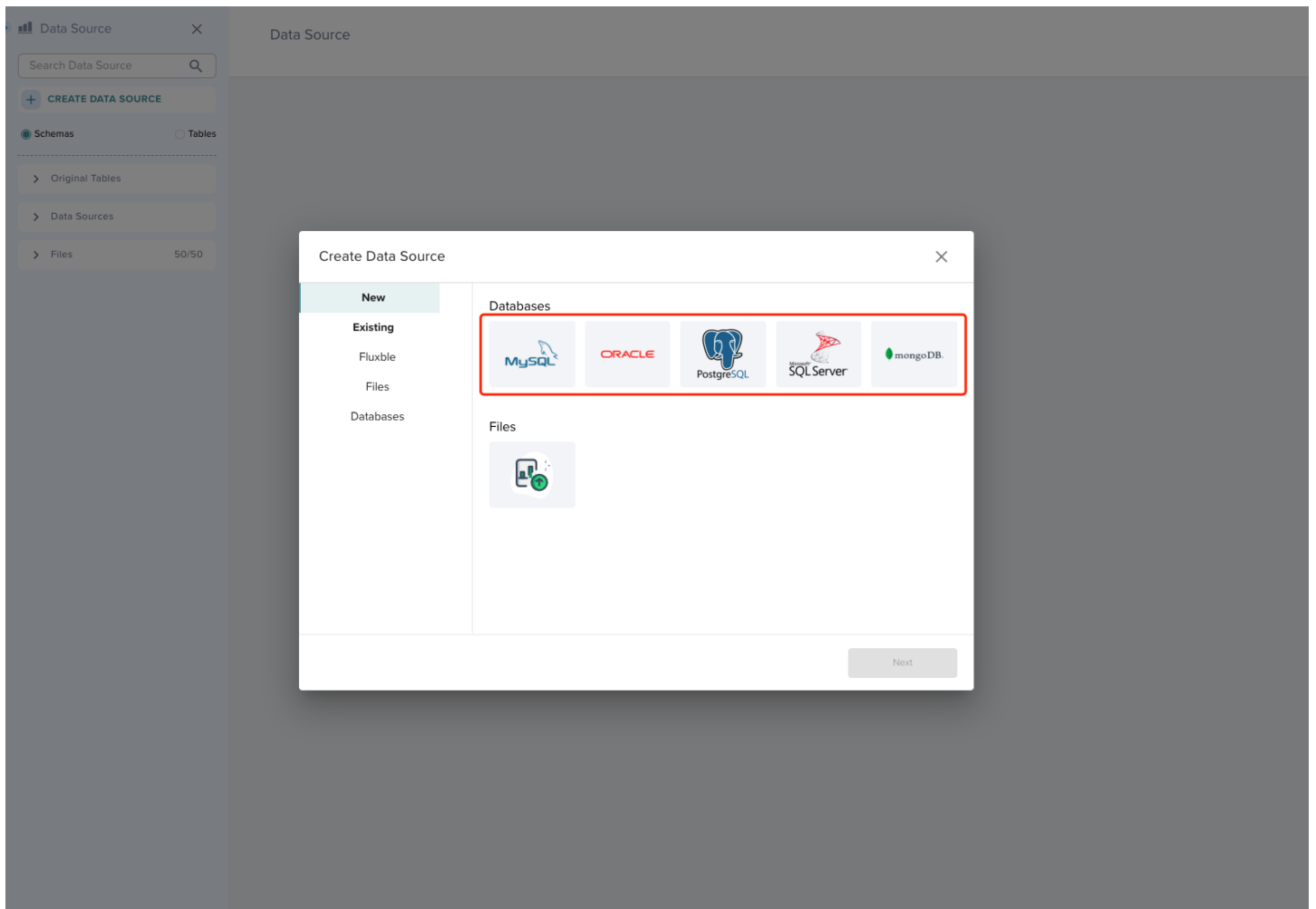
## Access Datasource

Before creating a dashboard, you need to create the required data sources, which support multiple types of database connections and local file uploads.

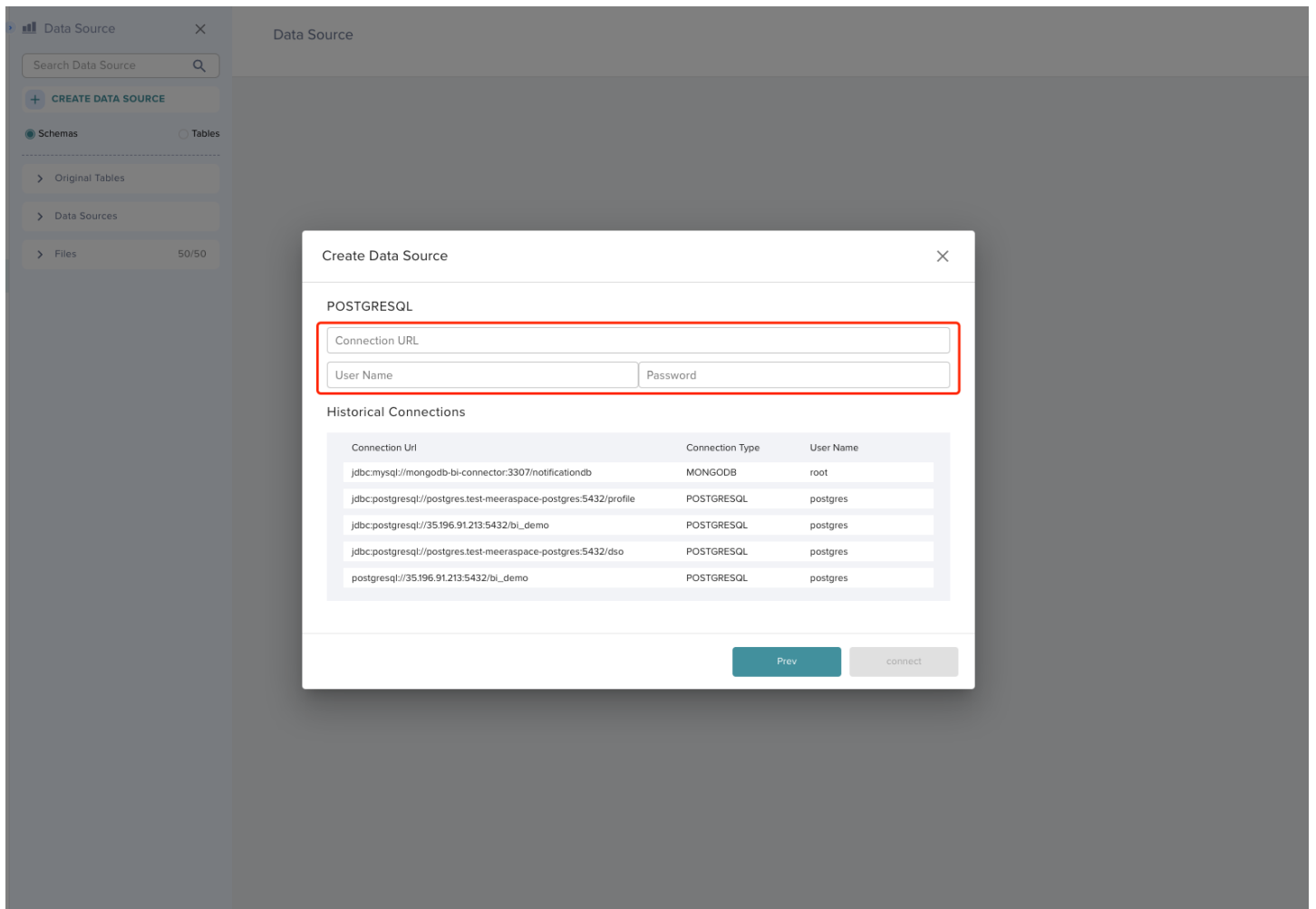


### 1. Supported Databases

MySQL,ORACLE,Postgres SQL,SQL Server,Mongo DB

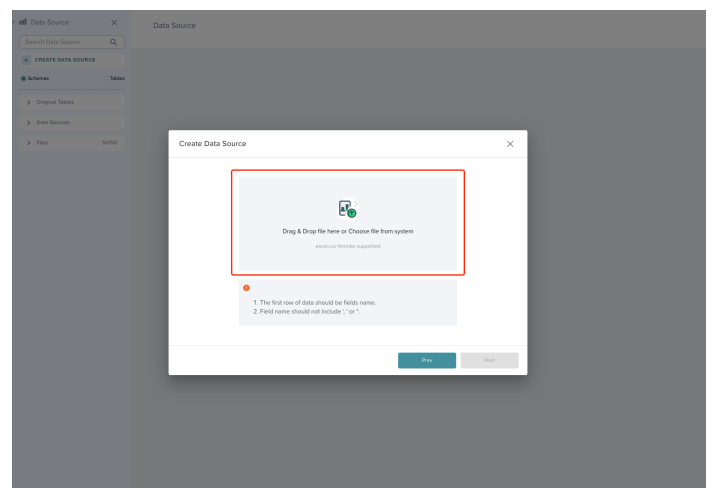
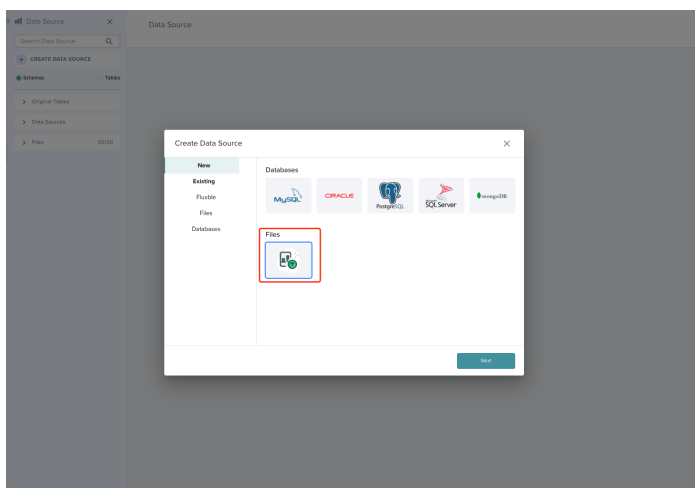


Enter the required database address and user information to complete the connection.



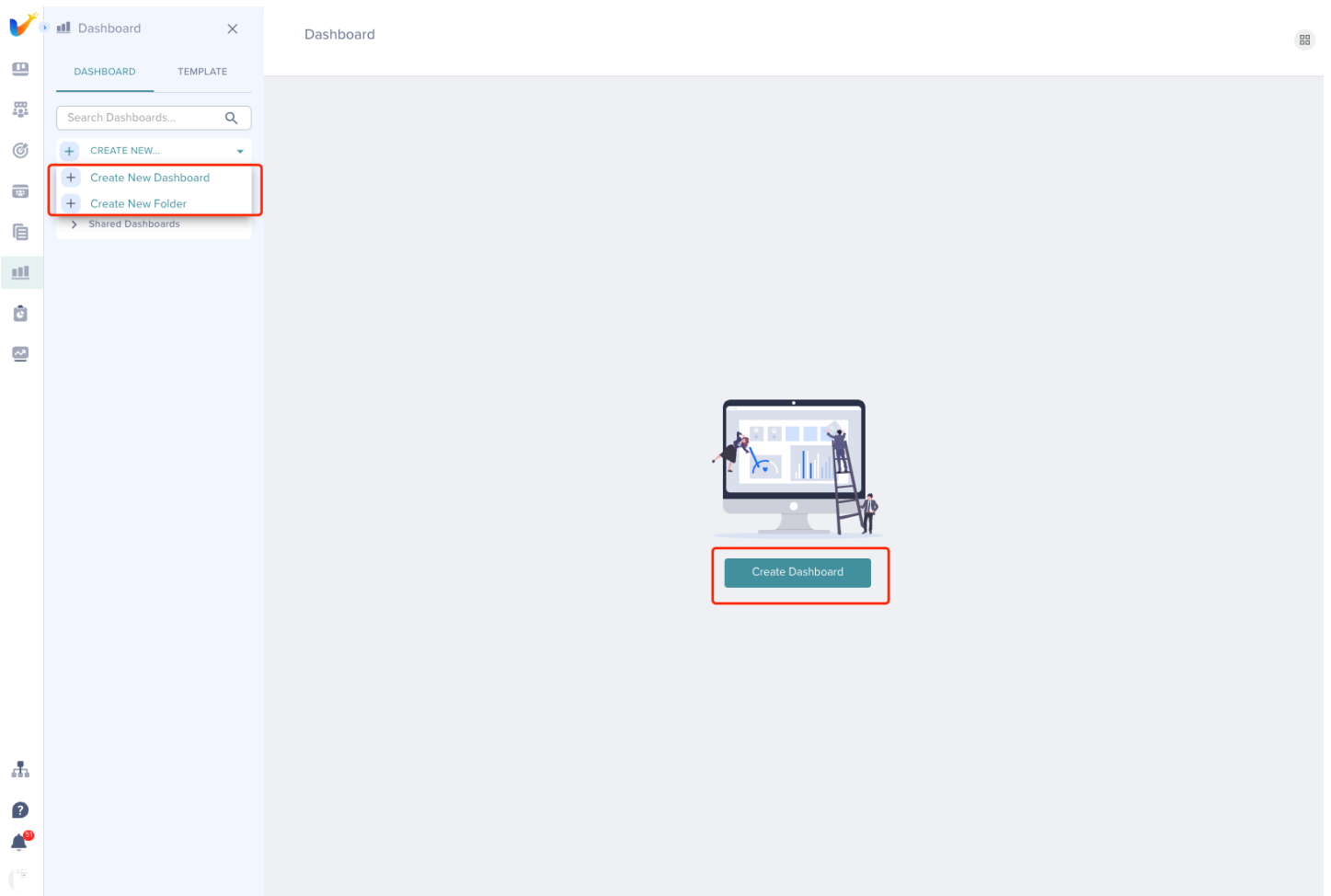
## 2. Supported files:

Supported upload CSV,Excel files.You can select a local data file and upload it.



## Create Dashboard

After the data is ready, create a new dashboard in Dashboard. If there are multiple dashboards with the same theme, you can create a folder for grouping.



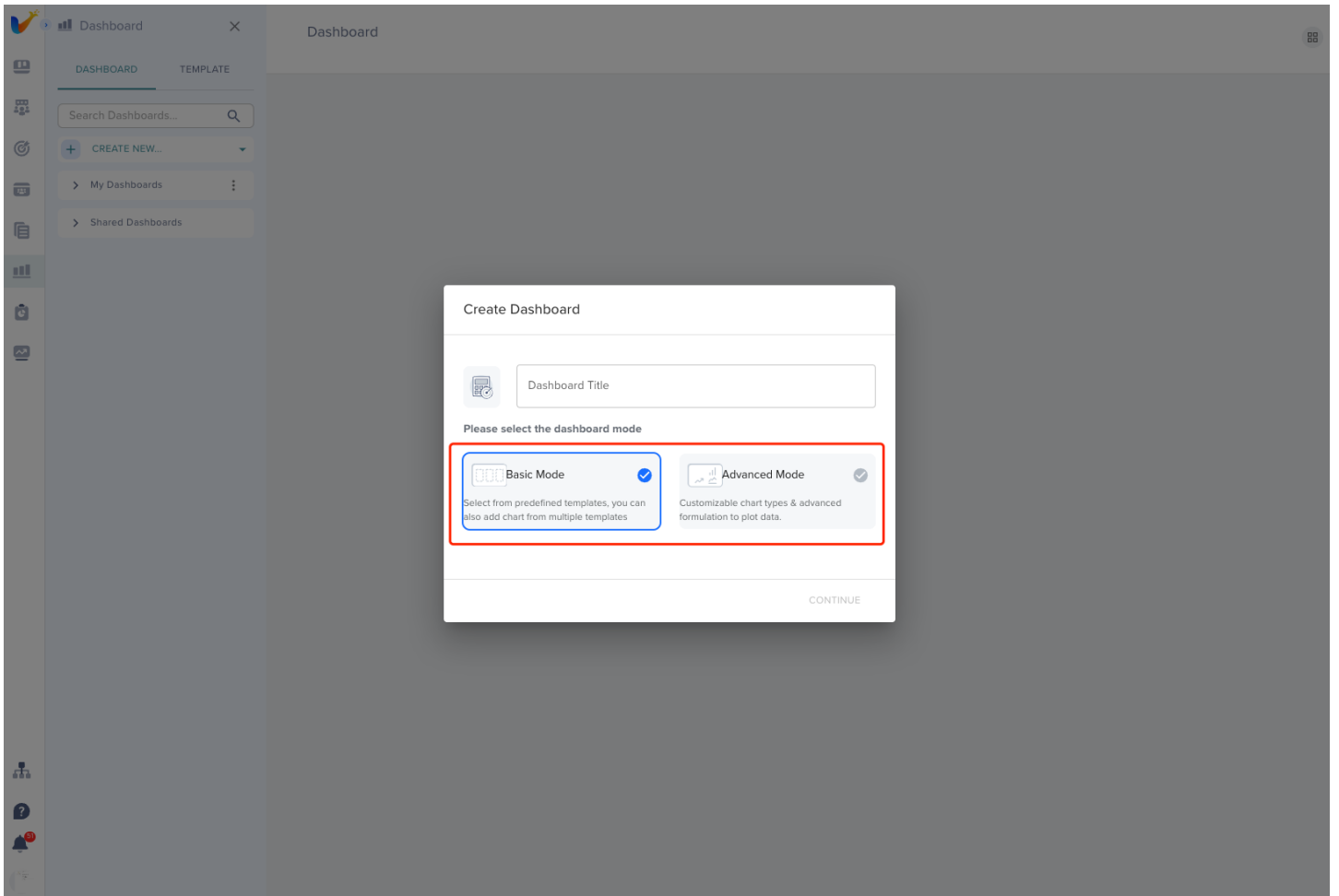
There are two ways to create a dashboard. You can choose according to your requirements:

## 1. Basic Mode

Select from predefined templates, you can also add charts from multiple templates. Which means you can copy a dashboard from an existing template and when done there will be some templates in the new dashboard

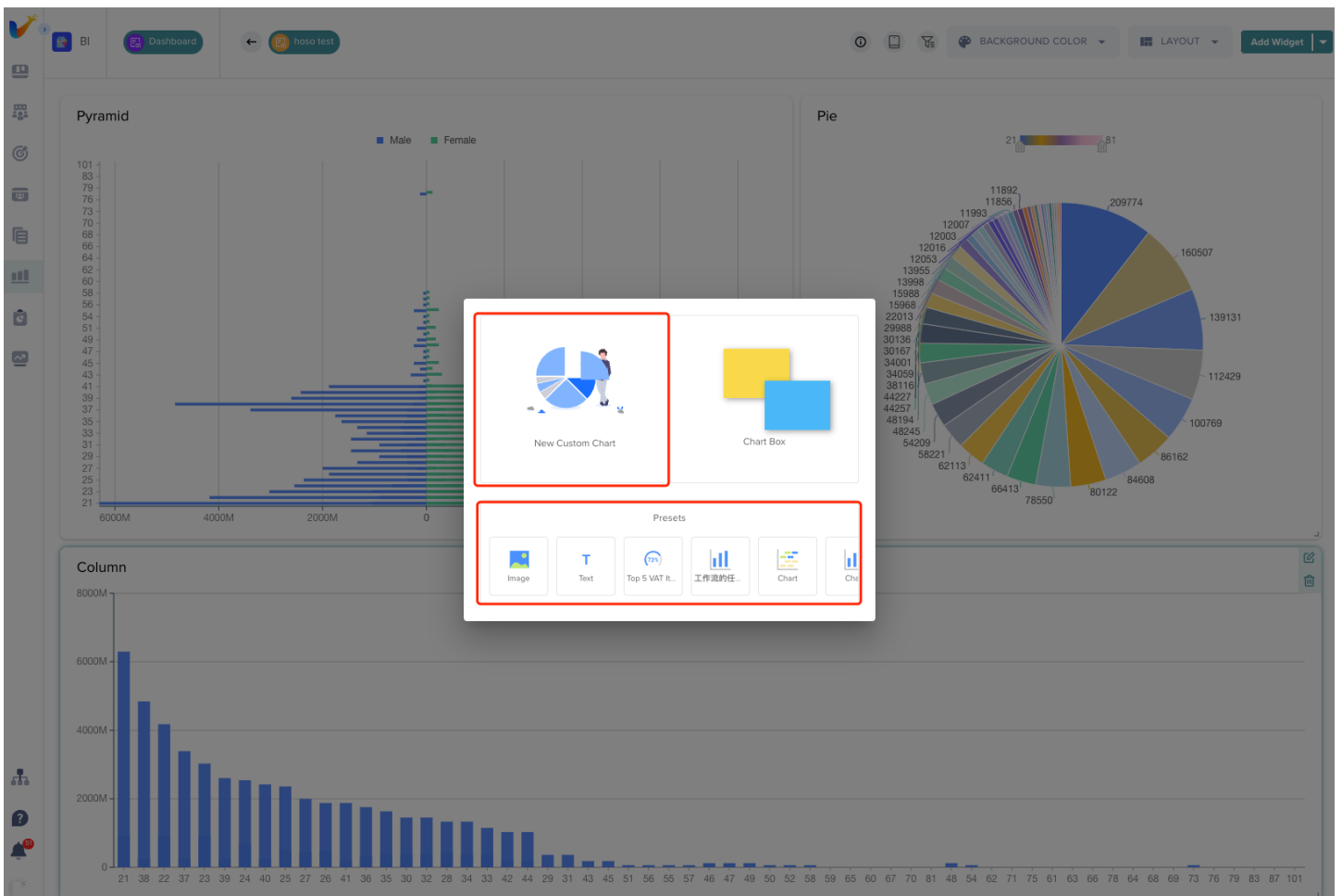
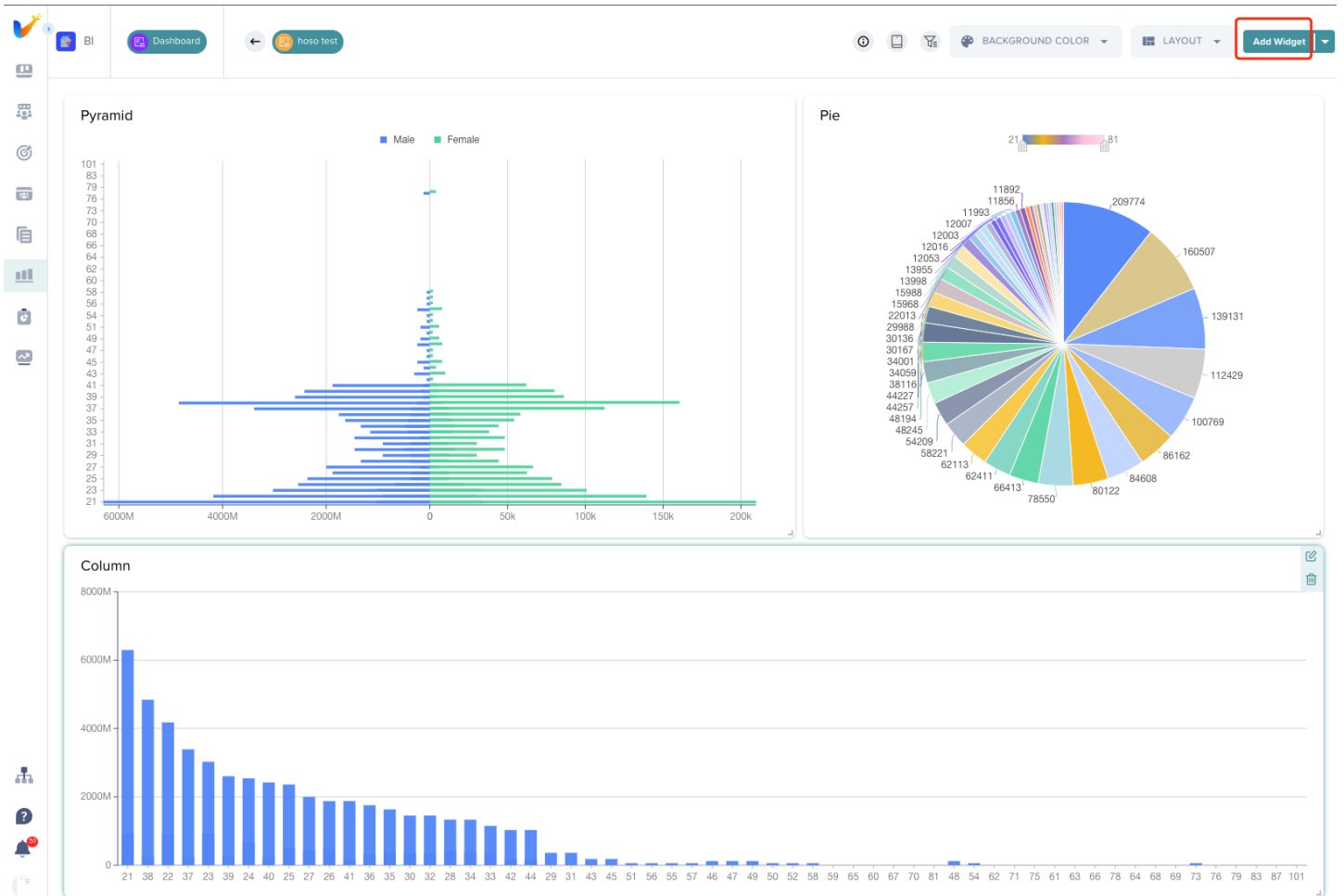
## 2. Advanced Mode

Customizable chart types & advanced formulation to plot data. You can create a blank dashboard to add custom charts and widgets.



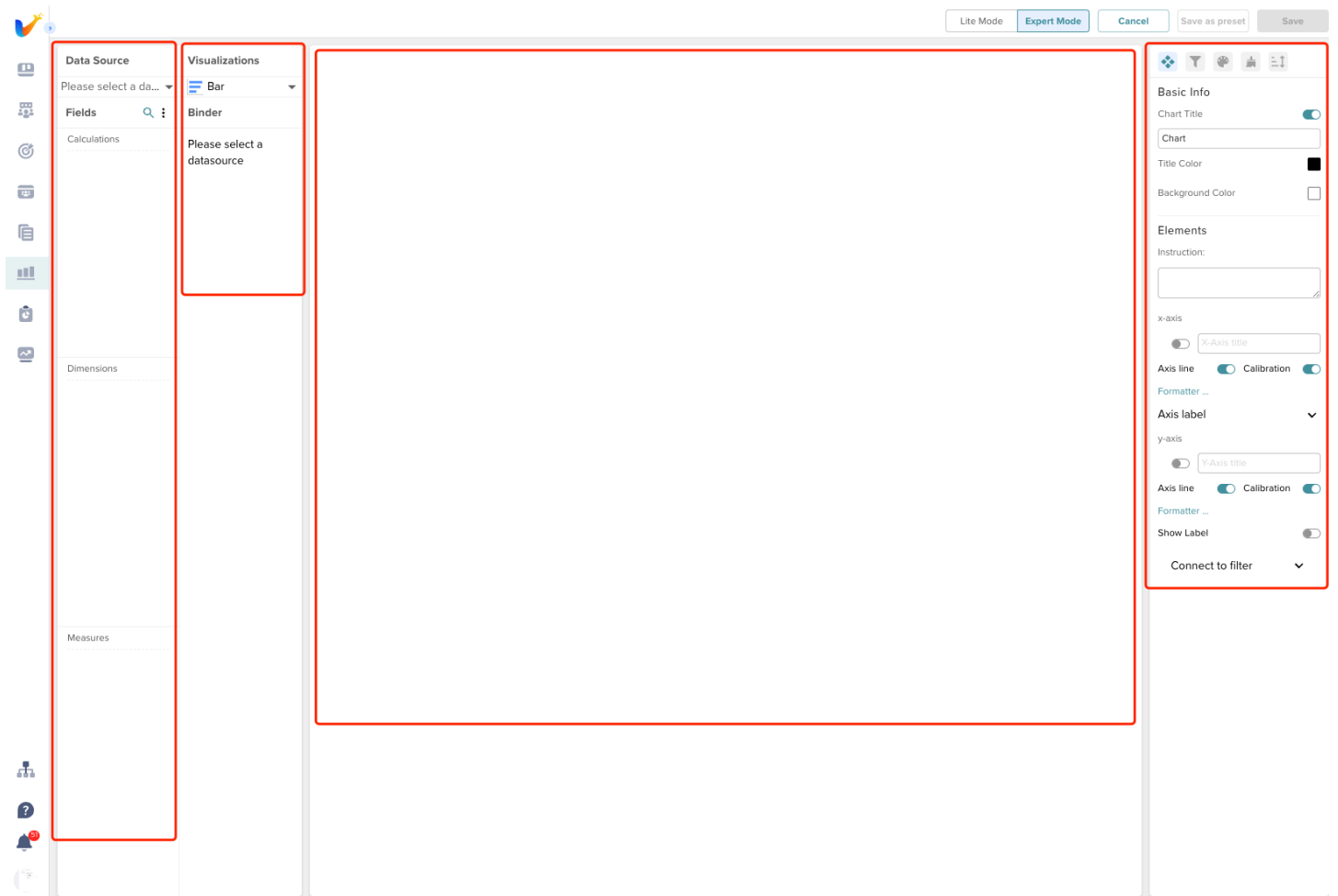
## Create Charts & Widgets

After a new dashboard is created, you need to add charts to the dashboard. You can also choose the preset chart and the custom chart.



# 1. New Custom Chart

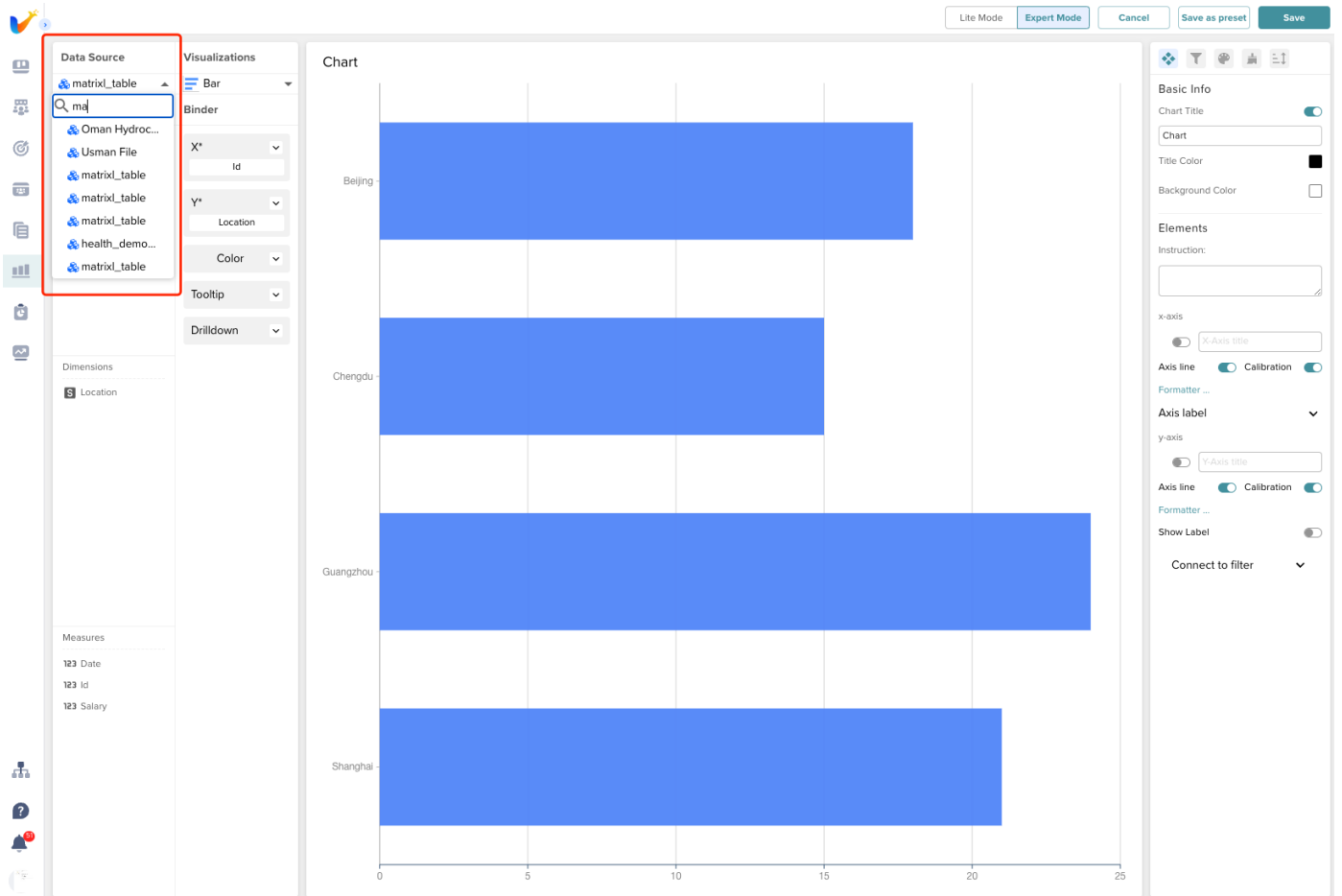
New Custom Chart is a new blank chart and you need create it by yourself.



There are 4 parts in the chart config page

## Select datasource

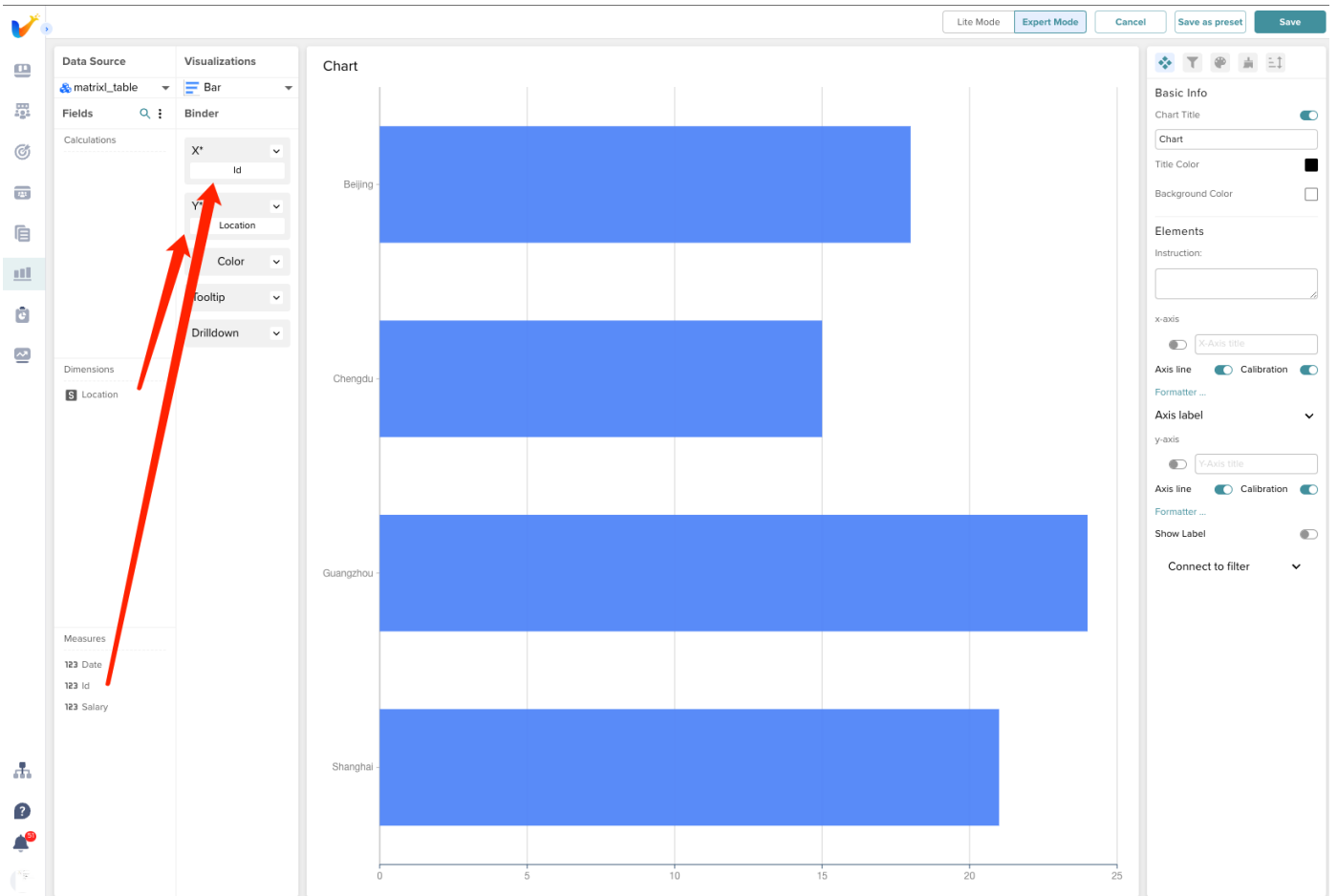
Select the data source that you prepared before.



## Visualizations&Chart preview

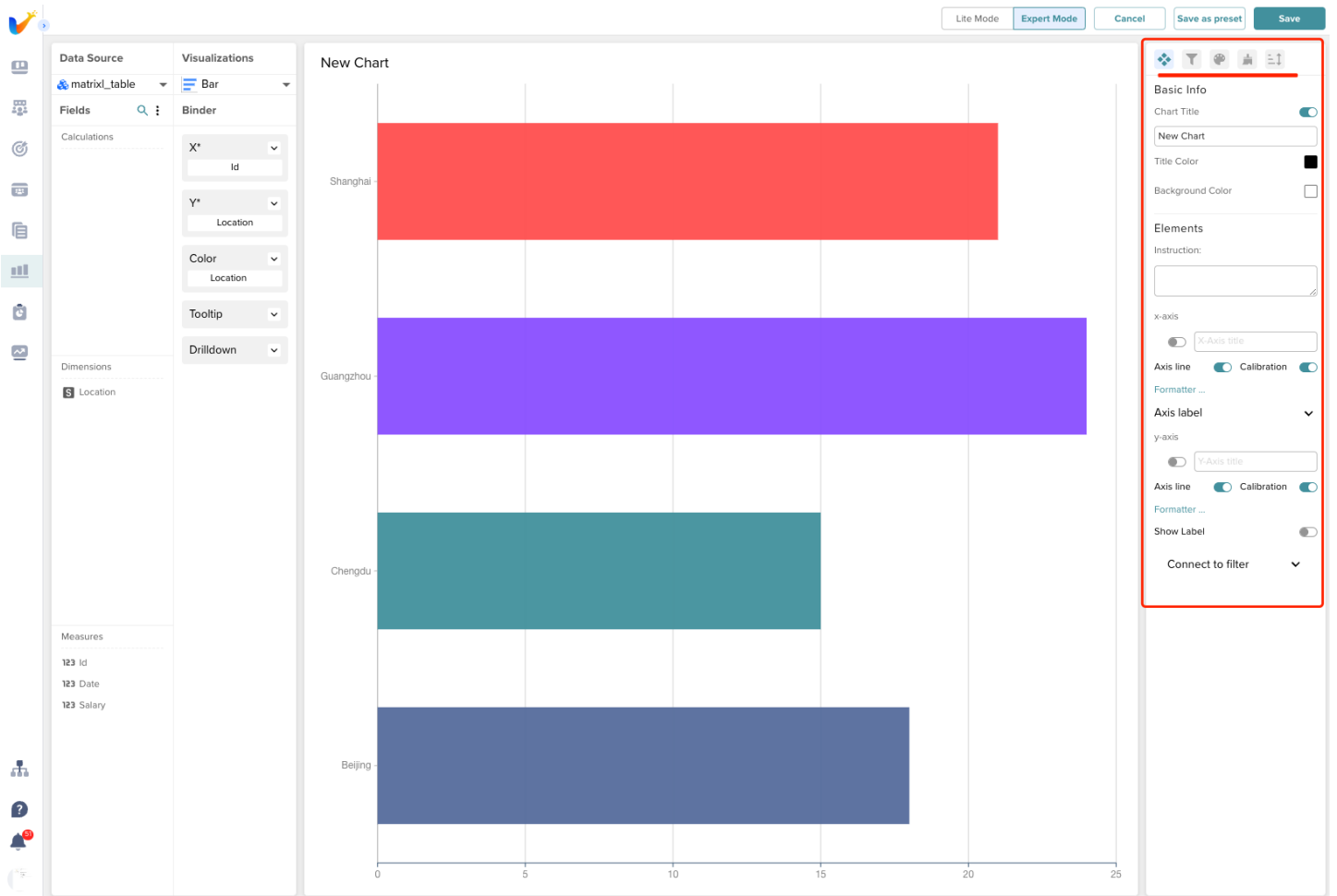
Drag the fields that need to be displayed to the corresponding area, and you can preview the chart in the visualization area, and pay attention to the rules for distinguishing the types of fields from different charts.





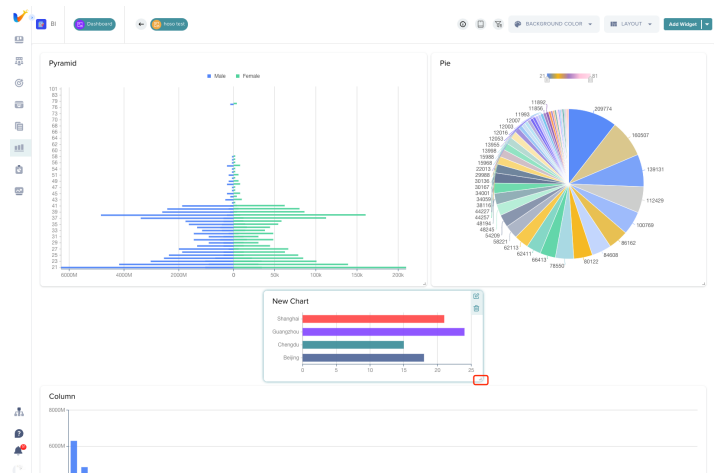
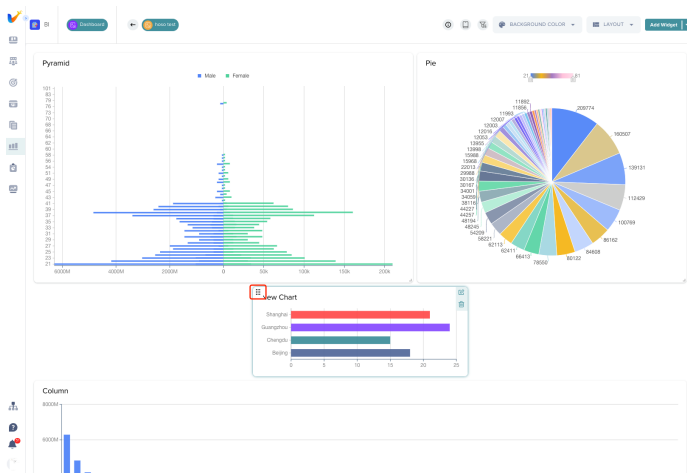
## Chart configurator

Customize settings in the chart configuration area, including title, font, font size, color, filter, sorting, palette, etc.



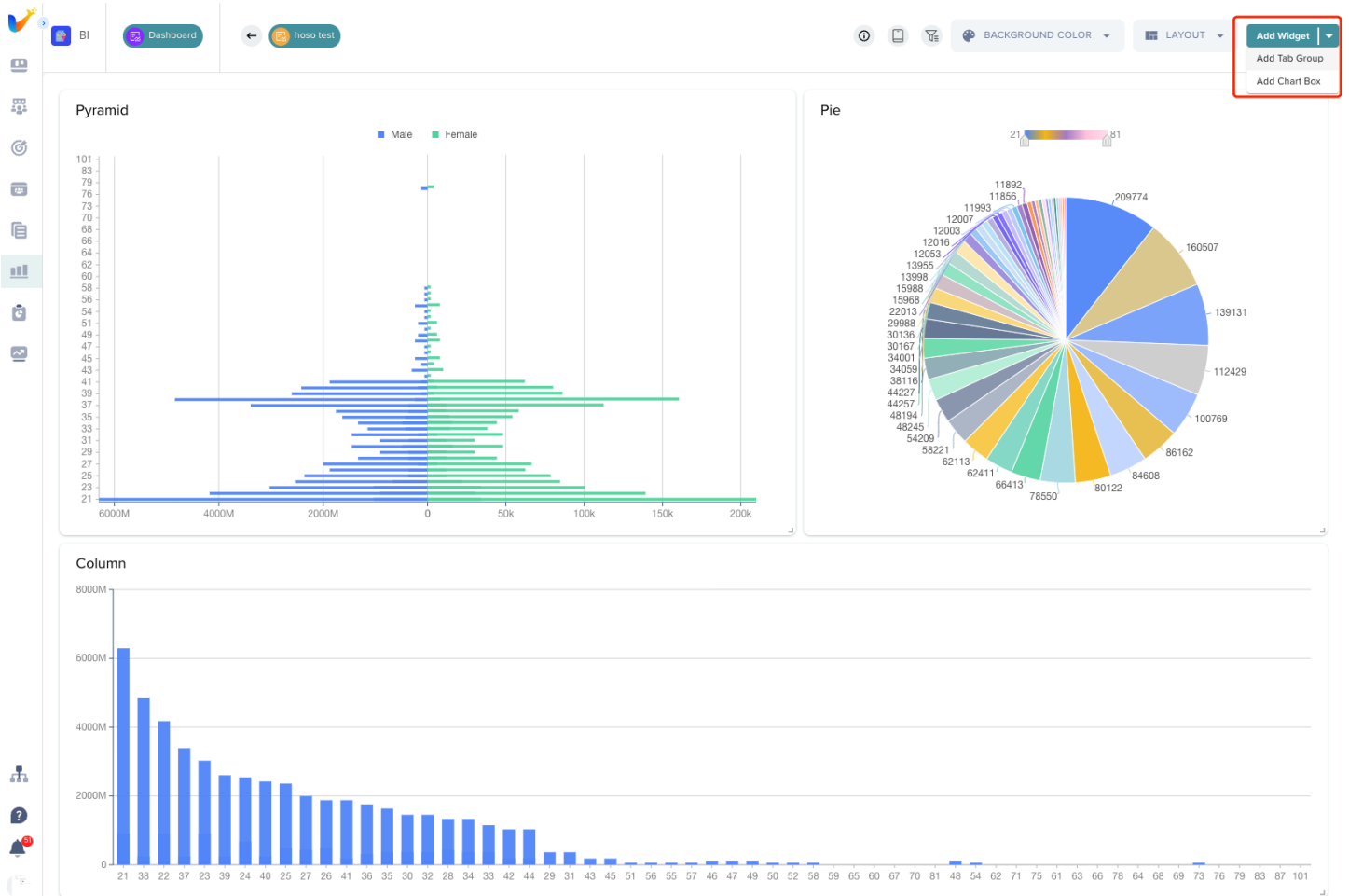
After completing the settings, click Save to view the chart on the dashboard and adjust the layout.

Click the upper left corner of the chart to adjust the position, click the lower right corner to adjust the size



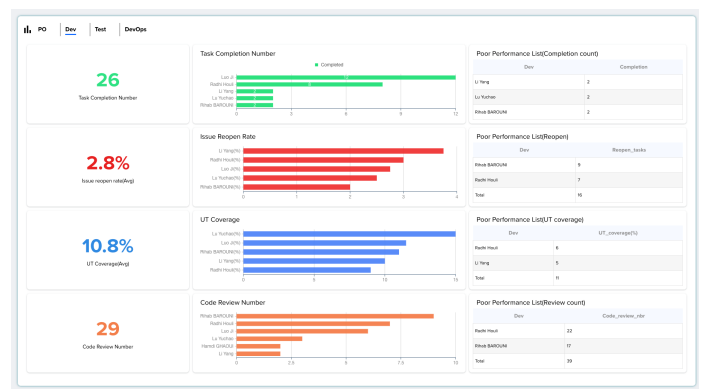
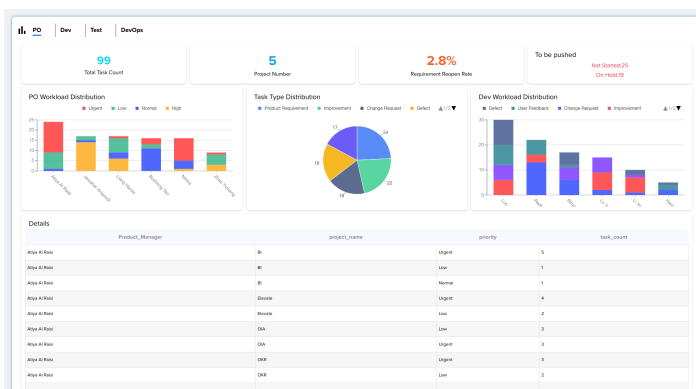
## 2. Widgets

In addition, you can add tab and chart box to group charts.



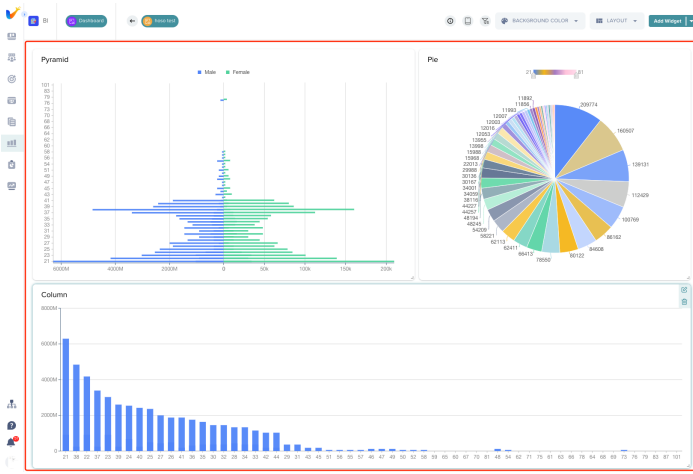
## Tab Group

Add different tabs, display multiple pages at the same time in the same dashboard, and switch at any time



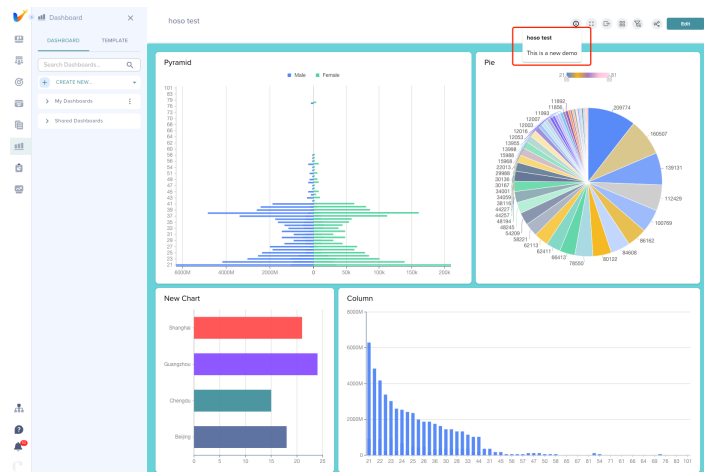
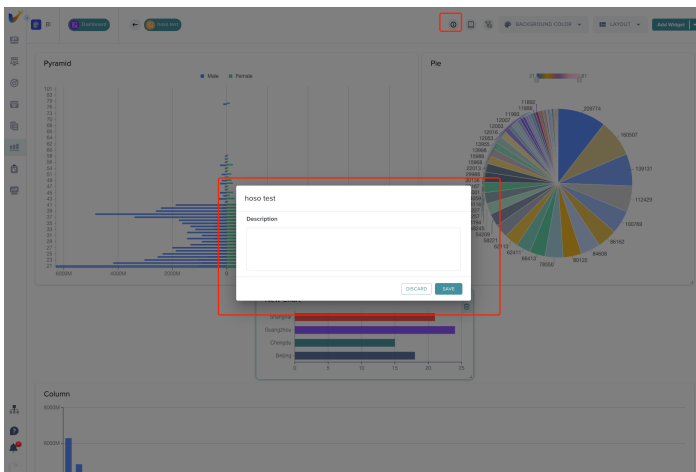
## Chart Box

Group charts for better layout

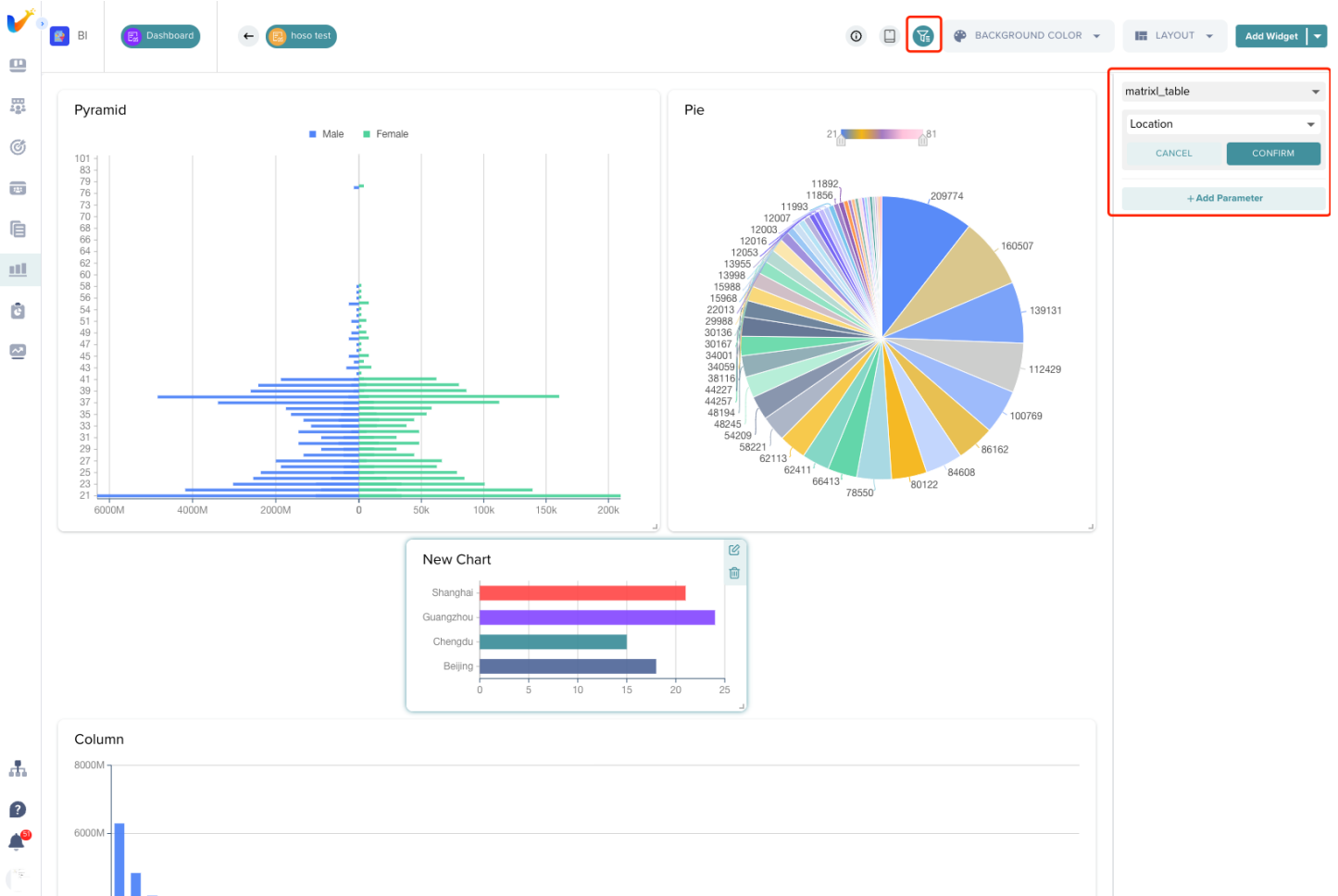


After completing the chart configuration, you can also optimize it on the dashboard page.

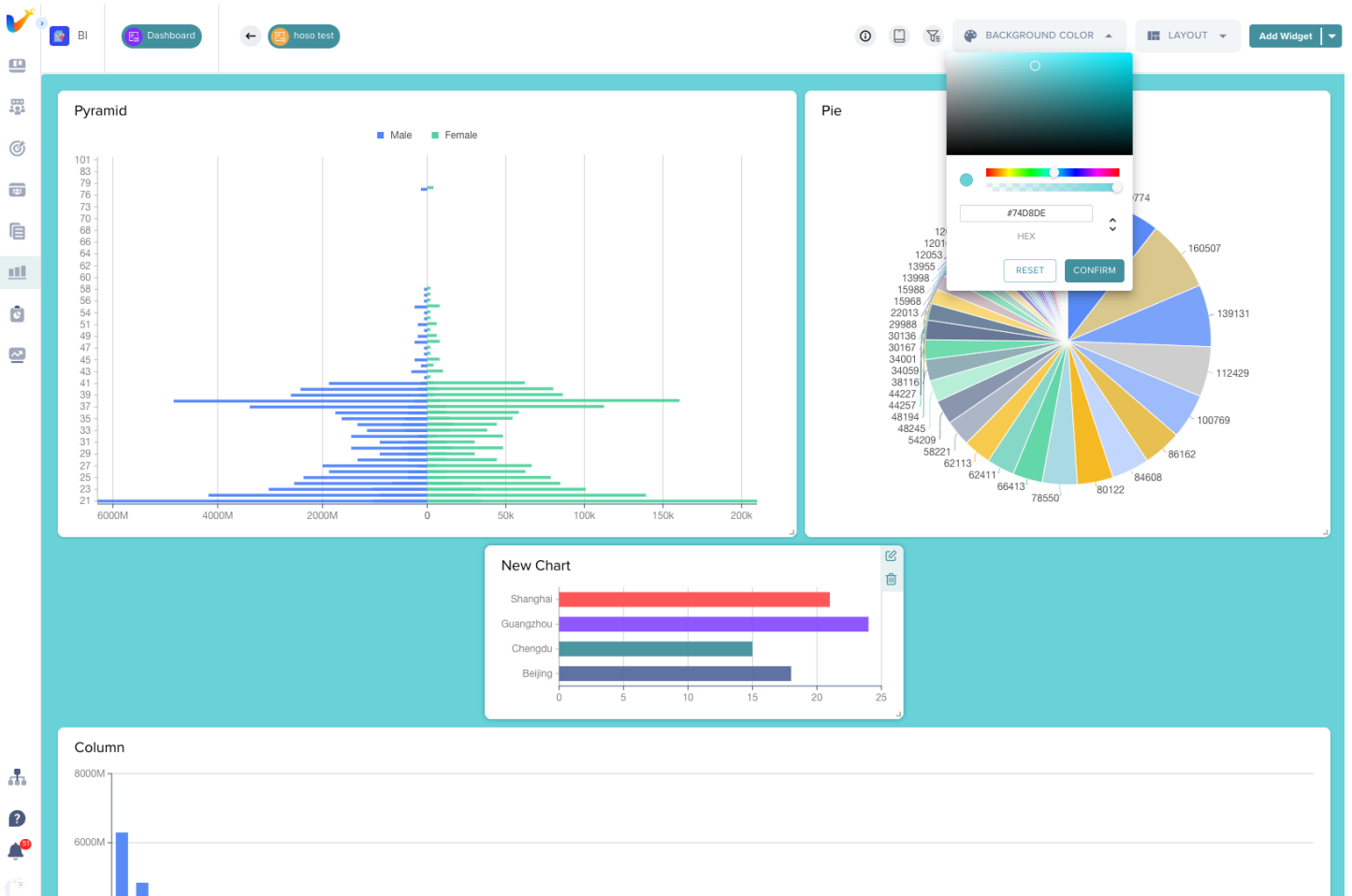
- Add a description for the new dashboard.



- Add filters to the dashboard.



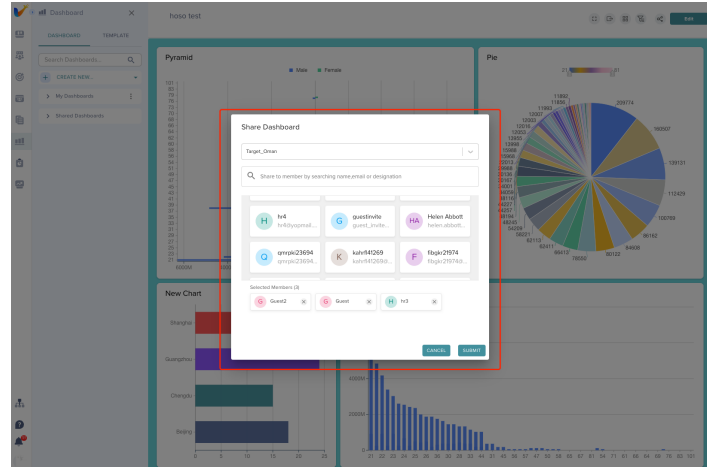
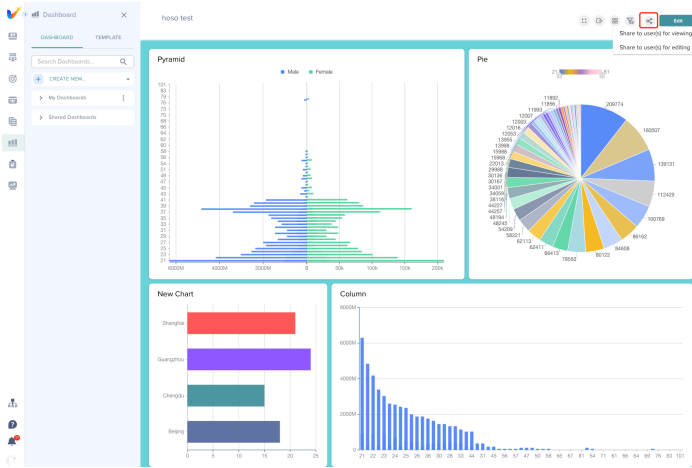
- Change background color.



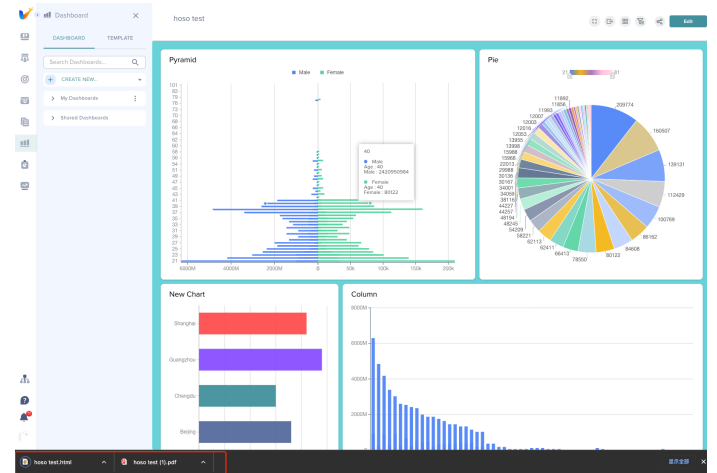
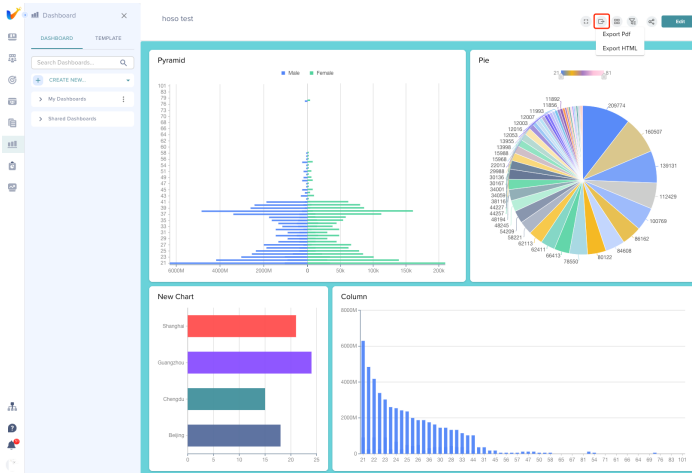
# Share Dashboard&Datasource

## Share Dashboard

After completing the dashboard configuration, you can share it with users in the organization through the sharing function. When sharing, you can choose to share editing permissions or read-only permissions.

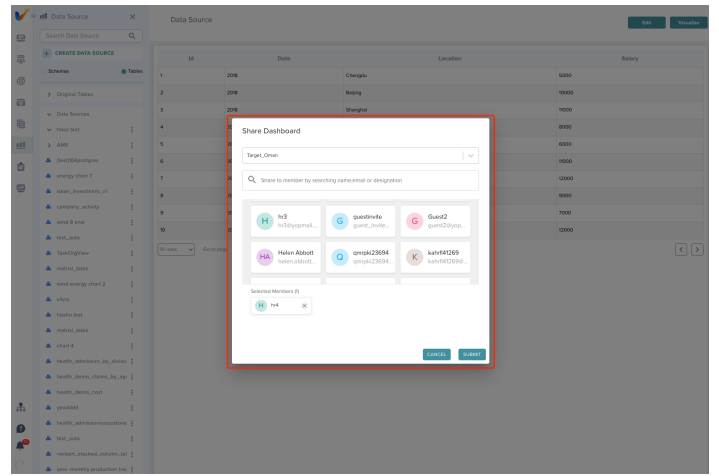
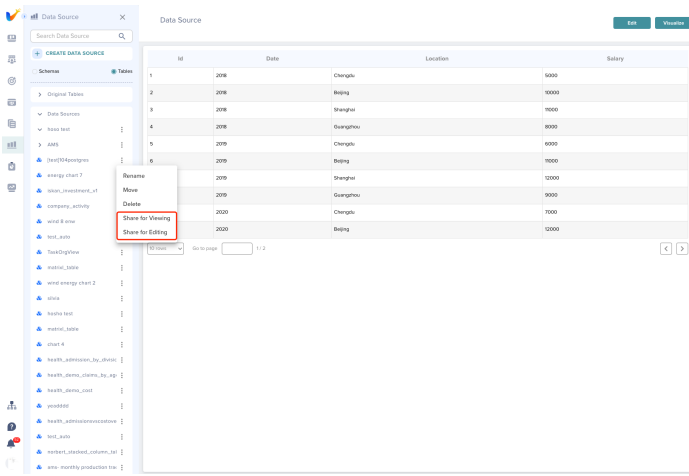


Also, if you want to share with external users, you can do it by exporting PDF or HTML files



## Share Data Source

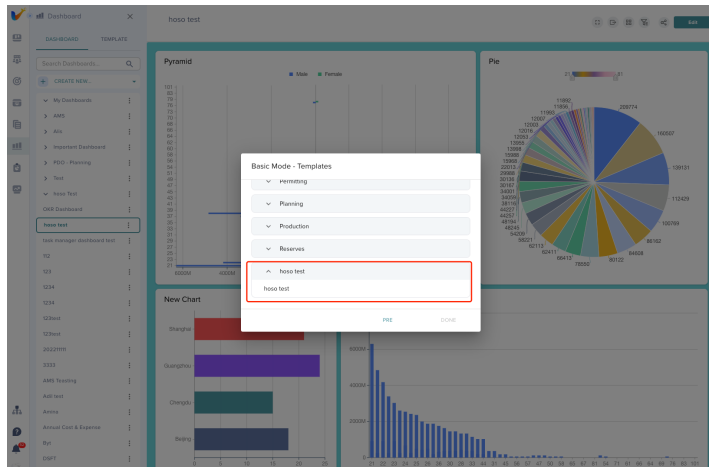
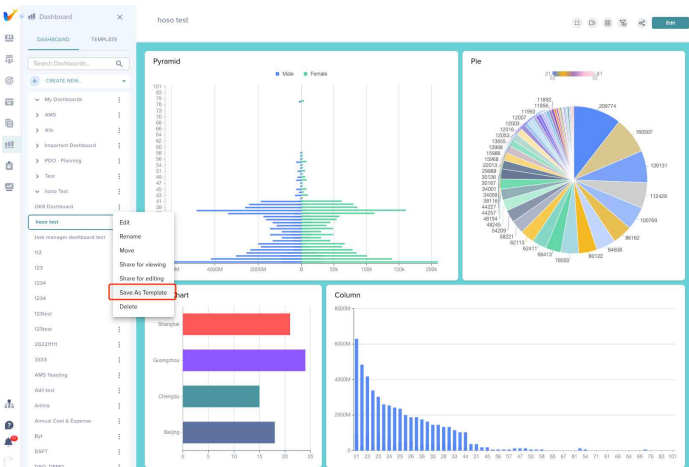
Data sources can be shared for viewing or editing by users within the organization.



# Template&Preset Chart

## Template

The template comes from the dashboard. You can save the existing dashboard as a template, and you can use the template you saved when creating a new dashboard.



## Preset Chart

The preset chart comes from the already created chart. You can save the existing chart as a preset chart, and you can directly add the saved preset chart when creating a new chart.

