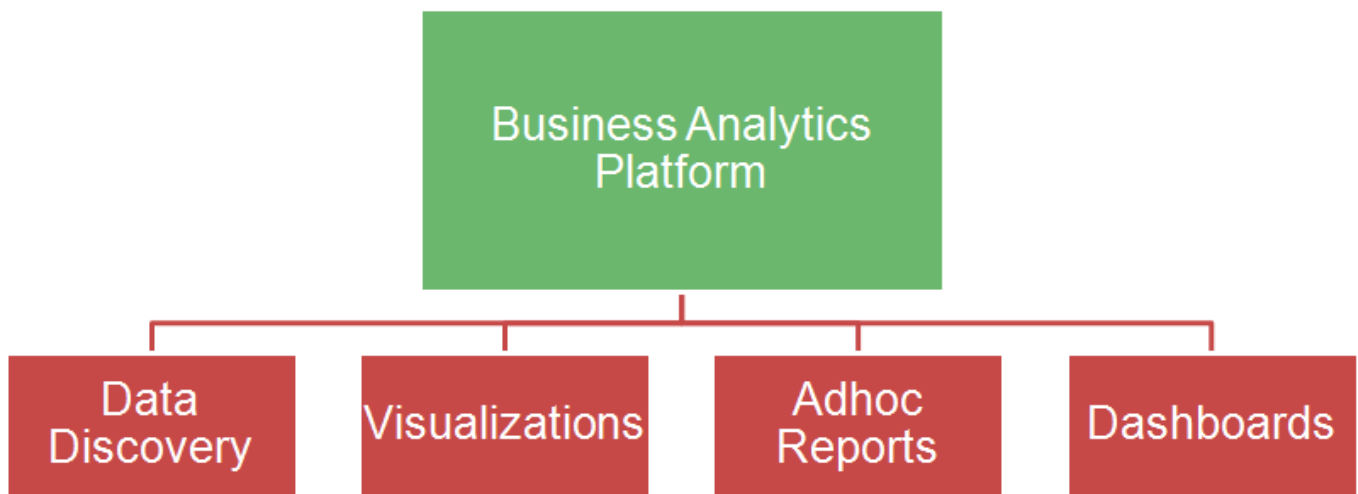


How to create dashboard using CSV or Excel file



Enterprise Business Analytics and Dashboards



InfoCaptor works with variety of data sources including CSV, Microsoft Excel , Microsoft Access, SQL databases like Oracle, SQL server, MySQL, PostgreSQL, SQLite, DB2, Hadoop Impala, Hadoop Hive and all the databases that support ODBC or JDBC protocol.

This tutorial illustrates the steps to build dashboard from scratch using data from CSV or Excel File.

Checkout the complete video tutorial : <https://vimeo.com/133233689>

Here is the interactive dashboard we will build in this tutorial

https://my.infocaptor.com/dash/mt.php?pa=retail_dashboard_55a13aa951824

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Dashboard Preparation - Pre-requisites

1. Retail Dashboard preview

This tutorial will teach you to build the dashboard as illustrated in the following screenshot.



2. Data set

You may download the CSV file available at this location <http://infocaptor.s3.amazonaws.com/infocaptor1.csv>

3.1 Download and Install InfoCaptor

Skip this section if you already installed. **Jump to step 3.2** if you want to build an online dashboard.

Download link: http://infocaptor.s3.amazonaws.com/infocaptor_enterprise_setup.exe

Download and run the setup for InfoCaptor.

3.2 Create online account

If you choose to create dashboard online instead of on your desktop then please register and create an online account: <https://my.infocaptor.com/dash/register.php>

Once you signup and login you can proceed with the following steps.

4. Preview Data

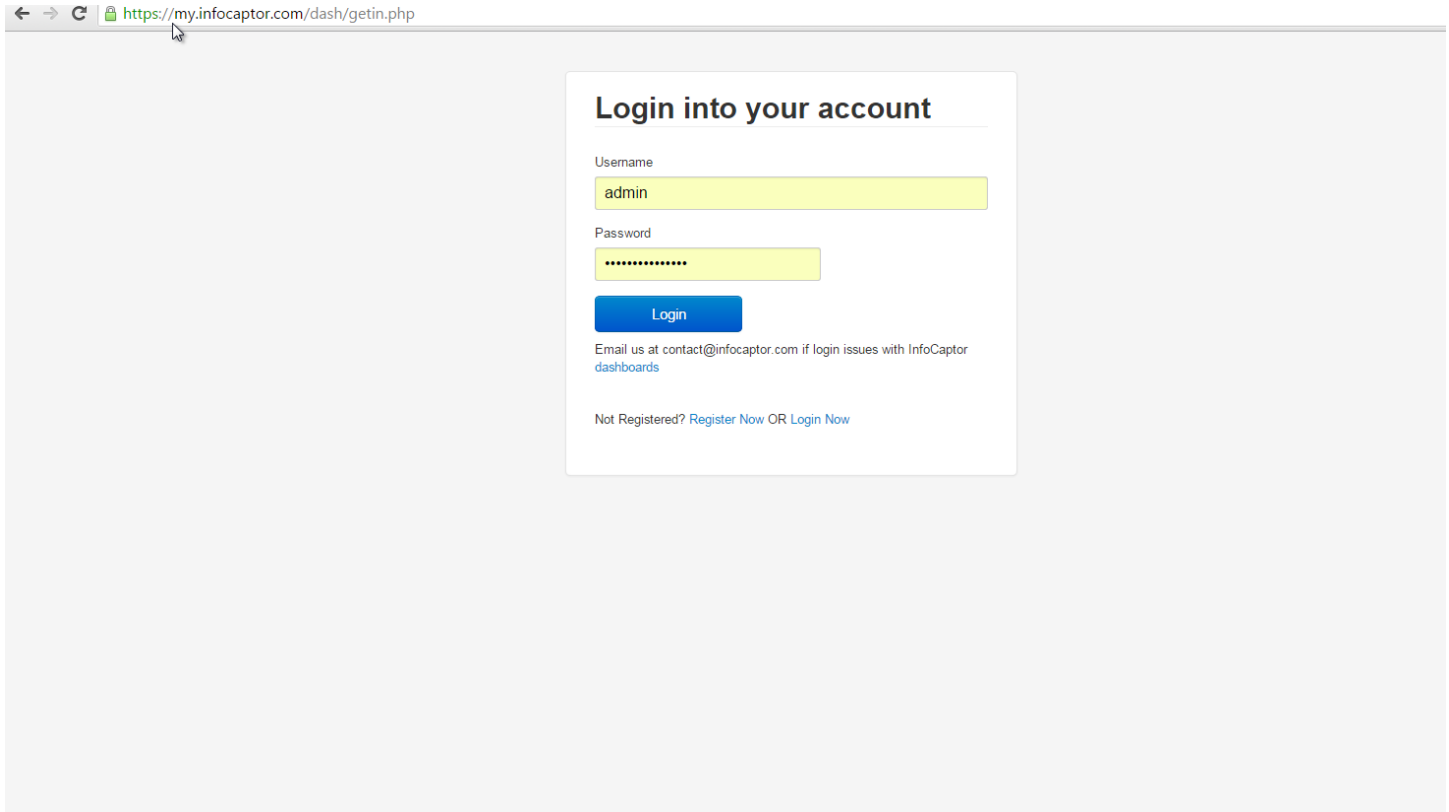
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T					
	Ship_Pri	Customer	Class	Category	Product	L	Warehouse	Region	Lo	Census	D	State	ord	date	affiliate	discount	unit	price	ship	cost	profit	qty	sales	order	year
2	Five Day	Corporation	book shelf	Office Stu	Central W	Midwest	East North	Illinois		8/28/2009	0:00	Consumer	0.14	266.75	67.64	-1127.2	8	1815	2009						
3	Five Day	Corporation	book shelf	Office Stu	Central W	Midwest	East North	Ohio		3/15/2009	0:00	Supply Co	0.06	283.98	59.94	41.71	5	1415	2009						
4	Five Day	Corporation	book shelf	Office Stu	Central W	Midwest	West North	Minnesota		1/11/2010	0:00	Bing	0.08	132.98	28	-76.27	1	163	2010						
5	Five Day	Corporation	book shelf	Office Stu	Central W	Midwest	West North	South Dak		6/22/2014	0:00	Google	0.21	249.98	12.01	1168.79	8	2033	2014						
6	Five Day	Corporation	book shelf	Office Stu	North We	Midwest	East North	Illinois		8/5/2009	0:00	Cheap Sup	0.03	308.11	60.74	67.29	29	5874	2009						
7	Five Day	Corporation	book shelf	Office Stu	North We	Midwest	West North	Kansas		4/11/2012	0:00	Google	0.18	429.13	82.63	-422.69	15	4959	2012						
8	Five Day	Corporation	book shelf	Office Stu	South We	Midwest	West North	Missouri		2/25/2010	0:00	Google	0.3	145.98	49.74	-479.79	6	822	2010						
9	Five Day	Corporation	chair	Office Stu	Central W	Midwest	East North	Illinois		12/24/2010	0:00	Supply Co	0.06	144.99	25.63	-76.29	3	507	2010						
10	Five Day	Corporation	chair	Office Stu	North We	Midwest	East North	Illinois		2/18/2008	0:00	Google	0.18	249.6	60.2	195.04	20	4390	2008						
11	Five Day	Corporation	desk	Office Stu	Central W	Midwest	East North	Illinois		6/14/2012	0:00	Eco Storez	0.12	224.97	12.59	495.01	4	840	2012						
12	Five Day	Corporation	desk	Office Stu	Central W	Midwest	East North	Michigan		9/11/2012	0:00	Yahoo	0	141.99	66.2	238.87	26	3417	2012						
13	Five Day	Corporation	desk	Office Stu	South We	Midwest	West North	Minnesota		4/26/2010	0:00	Google	0.2	299.85	58.76	-232.68	22	5453	2010						
14	Five Day	Corporation	desk	Office Stu	South We	Midwest	West North	Missouri		5/18/2013	0:00	Cheap Sup	0.08	172.99	12	484.46	7	879	2013						
15	Five Day	Corporation	file holder	Paper Stu	Central W	Midwest	East North	Michigan		1/1/2011	0:00	Turbo Sch	0.18	74.94	14.19	-42.99	2	75	2011						
16	Five Day	Corporation	file holder	Paper Stu	North East	Midwest	West North	Minnesota		4/25/2009	0:00	Supply Co	0.03	1502.97	25.7	-1034.08	1	1576	2009						
17	Five Day	Corporation	file holder	Paper Stu	South We	Midwest	East North	Illinois		3/20/2012	0:00	Eco Storez	0.1	420.98	10.06	539.21	27	11117	2012						
18	Five Day	Corporation	file holder	Paper Stu	South We	Midwest	West North	Iowa		7/14/2011	0:00	Yahoo	0.3	108.97	10	1178.84	23	1812	2011						
19	Five Day	Corporation	furniture	Office Stu	Central W	Midwest	East North	Illinois		1/27/2013	0:00	Google	0.27	76.98	26	-692.55	67	3504	2013						
20	Five Day	Corporation	furniture	Office Stu	Central W	Midwest	East North	Michigan		4/14/2012	0:00	Cheap Sup	0.18	290.98	37.91	1254.98	16	3884	2012						
21	Five Day	Corporation	ink	Printing S	Central W	Midwest	West North	Missouri		4/28/2009	0:00	Yahoo	0.06	15.81	-0.63	-26.59	17	101	2009						
22	Five Day	Corporation	ink	Printing S	Central W	Midwest	West North	Missouri		7/20/2012	0:00	Bing	0.24	551.98	25.14	1296.51	4	1975	2012						
23	Five Day	Corporation	ink	Printing S	Central W	Midwest	West North	Missouri		7/7/2014	0:00	Yahoo	0.15	454.98	9.06	916.14	7	3355	2014						
24	Five Day	Corporation	ink	Printing S	South We	Midwest	East North	Indiana		3/8/2012	0:00	Google	0.12	187.98	33.09	-434.9	8	1181	2012						
25	Five Day	Corporation	inkjet printer	Printing S	North East	Midwest	East North	Illinois		4/6/2014	0:00	Turbo Sch	0.02	308.98	61.73	-65.3	1	383	2014						
26	Five Day	Corporation	inkjet printer	Printing S	North East	Midwest	East North	Michigan		4/24/2012	0:00	Cheap Sup	0.3	297.97	24.06	398.99	9	2059	2012						
27	Five Day	Corporation	inkjet printer	Printing S	South We	Midwest	West North	Missouri		10/23/2014	0:00	Yahoo	0.15	551.98	23.14	5923.74	20	9772	2014						
28	Five Day	Corporation	label makers	Paper Stu	Central W	Midwest	East North	Indiana		1/17/2012	0:00	Supply Co	0.1	164.98	25	-145.02	11	1102	2012						
29	Five Day	Corporation	label makers	Paper Stu	Central W	Midwest	West North	Kansas		9/27/2012	0:00	Supply Co	0.24	301.98	66.55	978.38	21	5332	2012						
30	Five Day	Corporation	label makers	Paper Stu	South We	Midwest	East North	Illinois		4/23/2012	0:00	Consumer	0.12	226.75	64.64	-517.23	2	516	2012						
31	Five Day	Corporation	label makers	Paper Stu	South We	Midwest	East North	Indiana		4/12/2008	0:00	Print Man	0	87.98	23.74	37.47	6	503	2008						
32	Five Day	Corporation	laser printer	Printing S	Central W	Midwest	East North	Illinois		2/11/2008	0:00	Bing	0	2591.14	27.7	-5349.49	1	3193	2008						

As seen, the data needs to be organized in a tabular format as shown above. The first row is expected to be the column header names.

Dashboard Creation

Load Data

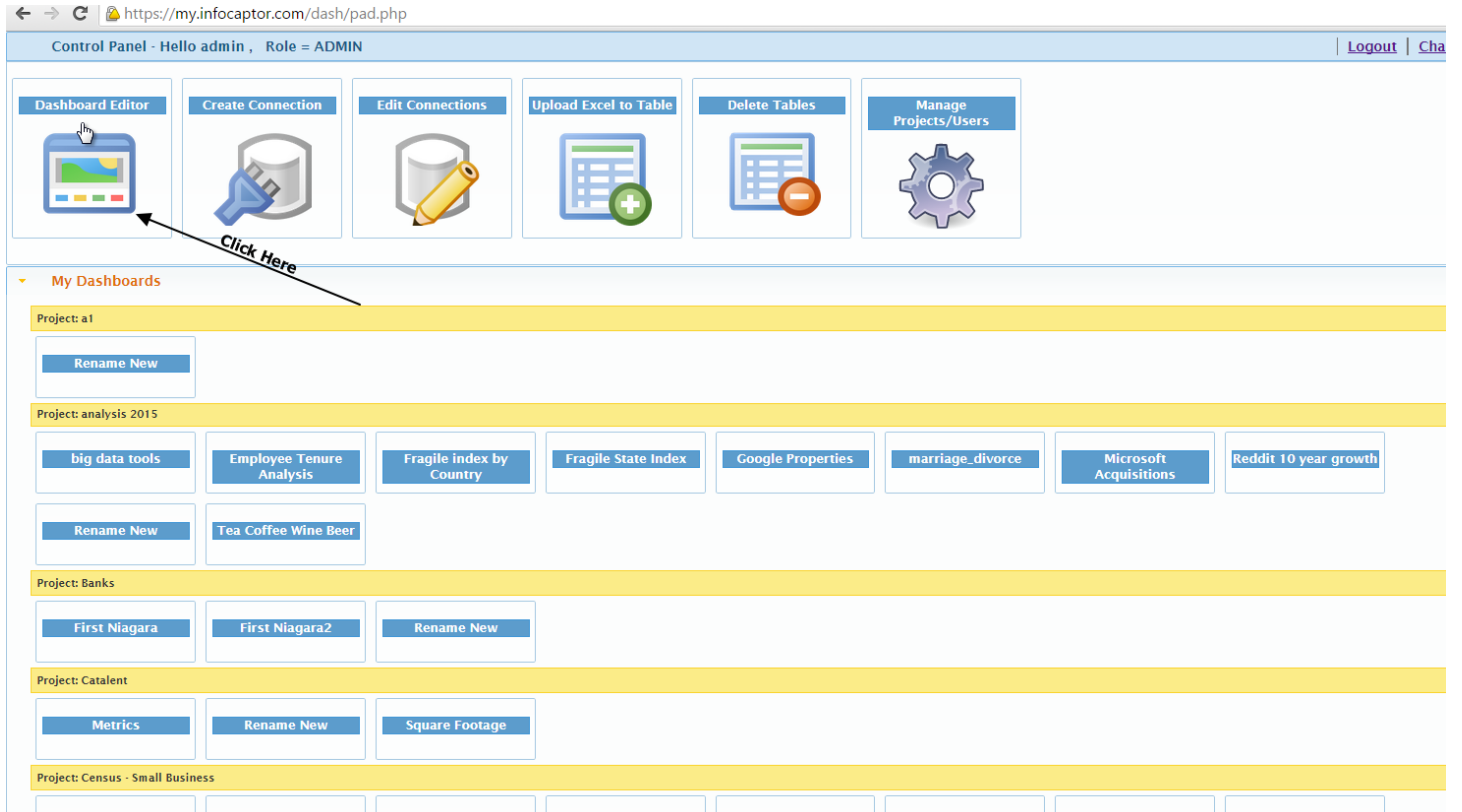
1. Login Online Dashboard



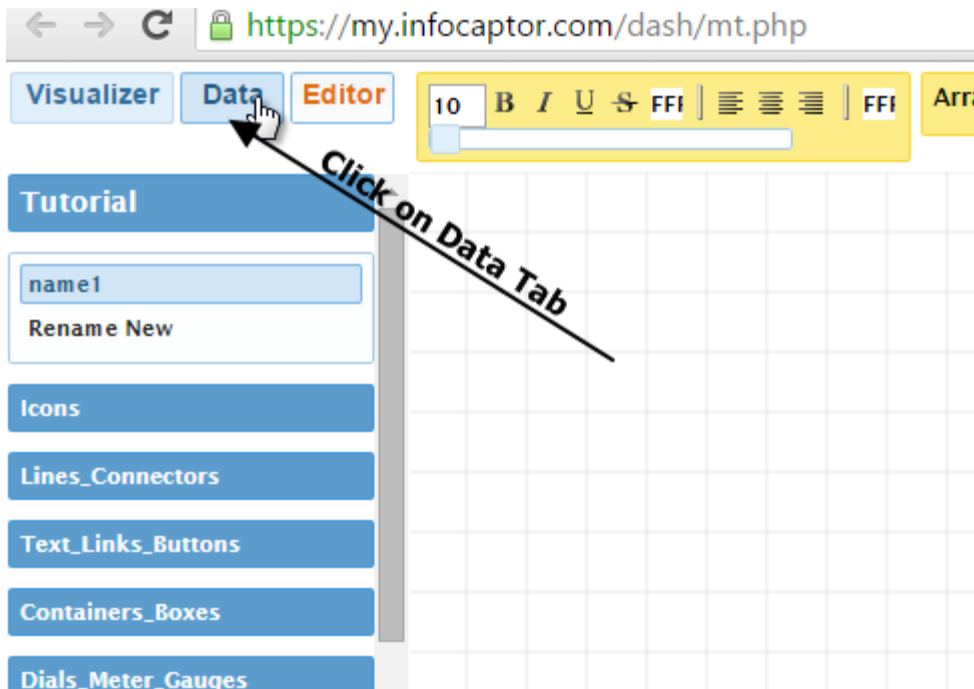
In this tutorial we will use the online Dashboard Software-as-service to build and publish our dashboard. Login to the service using your credentials

[If you don't have an account then create it here <https://my.infocaptor.com/dash/register.php>]

2. Click on Dashboard Editor icon



3. Switch to the Data Tab



4. Expand CSV file node

<https://my.infocaptor.com/dash/mt>

Visualizer **Data** Editor

- + Load Saved Data Models
- + Copy/Paste Data from Excel or CSV file
- + **Select a CSV file**
- + Use Database Table/SQL

Click to expand

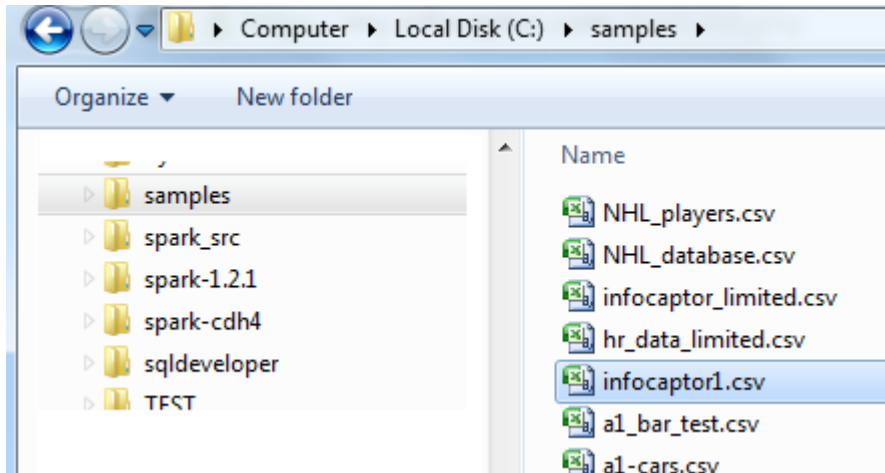
5. Click on the CSV file button

Visualizer **Data** Editor

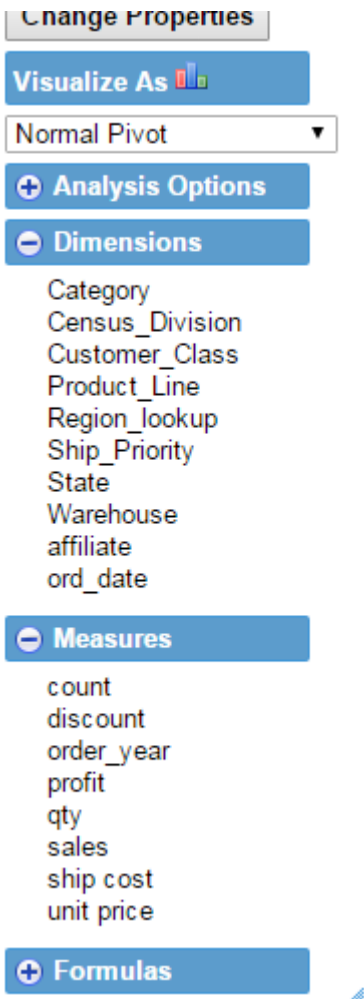
- + Load Saved Data Models
- + Copy/Paste Data from Excel or CSV file
- **Select a CSV file**

Choose File No file chosen

6. Select the file infocaptor1.csv




7. Dimensions and measures



8. Create date hierachy

Right click on the "ord_date" field and select "Create Date Hierarchy"

Change Properties

Visualize As 

Normal Pivot ▾

+ Analysis Options

- Dimensions

- Category
- Census_Division
- Customer_Class
- Product_Line
- Region_lookup
- Ship_Priority
- State
- Warehouse
- affiliate
- ord_date

right click on ord_date

- Meas

- count
- discou
- order_
- profit
- qty
- sales
- ship cost
- unit price

+ Formulas

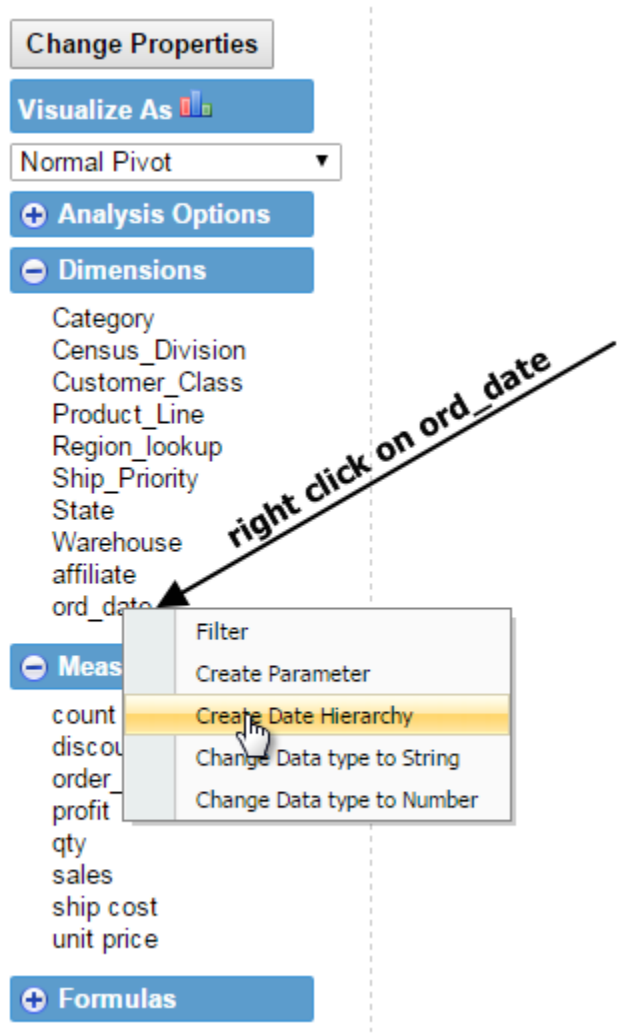
Filter

Create Parameter

Create Date Hierarchy

Change Data type to String

Change Data type to Number



Dimensions

- affiliate
- Category
- Census_Division
- Customer_Class
- ord_date
- ord_date_day
- ord_date_mth_name
- ord_date_mth_num
- ord_date_qtr
- ord_date_week_day
- ord_date_year
- ord_date_yr_qtr
- Product_Line
- Region_lookup
- Ship_Priority
- State
- Warehouse

The date hierarchy operation creates additional useful columns so that you can perform aggregate analysis by year, quarter, month, week and day of month

9. Change ord_date_year to string type

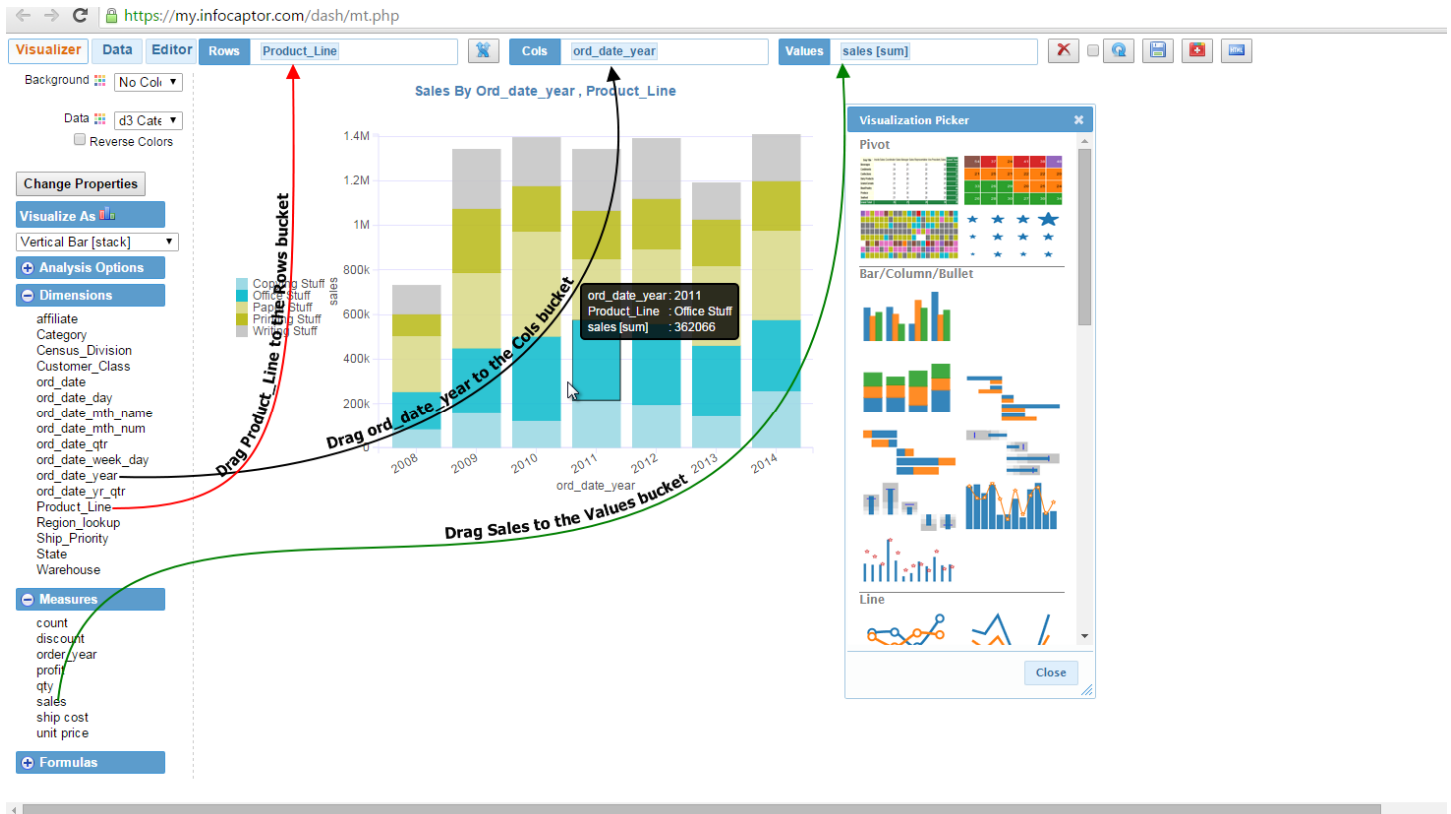
The screenshot shows a list of dimension fields on the left. A context menu is open over the 'ord_date_year' field, with the option 'Change Data type to String' highlighted. In the background, a timeline chart is visible with a vertical axis labeled '0' and a horizontal axis labeled '2005'.

Measures

- count

Data is now loaded and ready for analysis

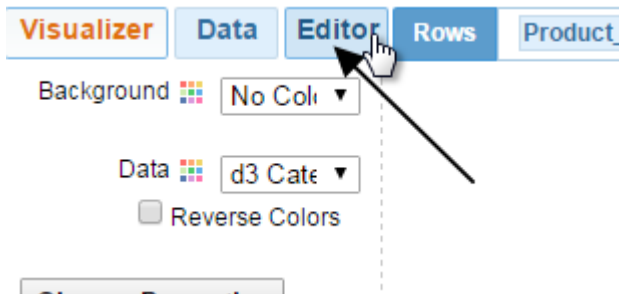
Build Chart 1 : Sales by year and product line



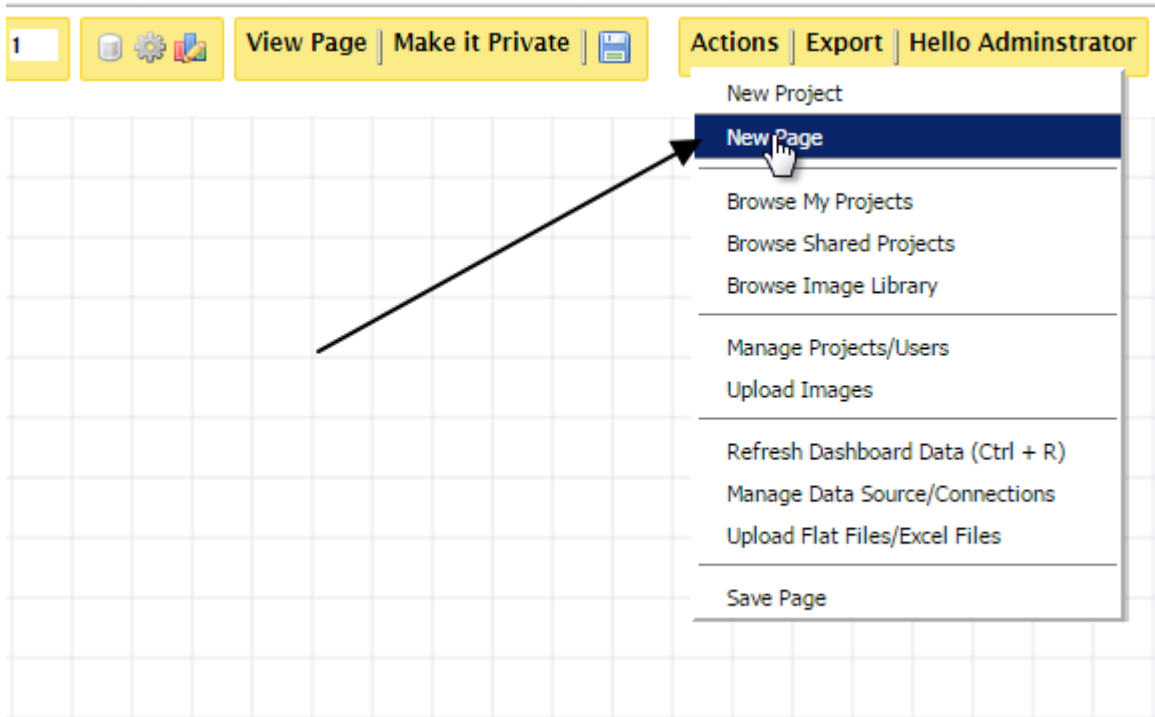
1. Drag "Product Line" to Rows bucket
2. Drag "ord_date_year" to Cols bucket
3. Drag "Sales" to Values bucket
4. Select "Vertical Bar [Stack]" from the Visualization Picker

Add Chart 1 to Dashboard

1. Switch to Editor Tab



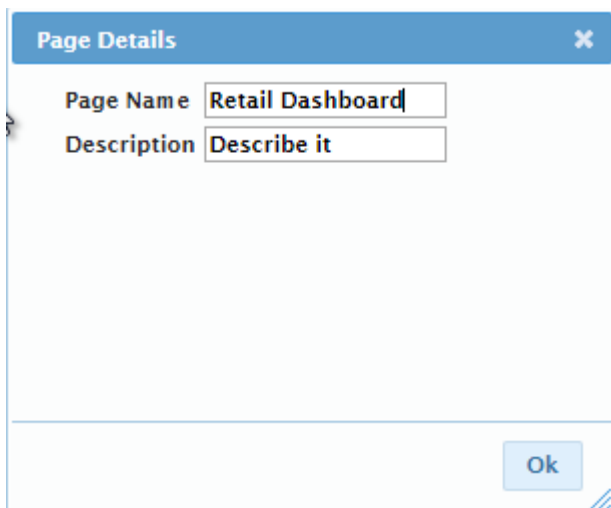
2. Create new dashboard page



1. Click on "Actions" menu

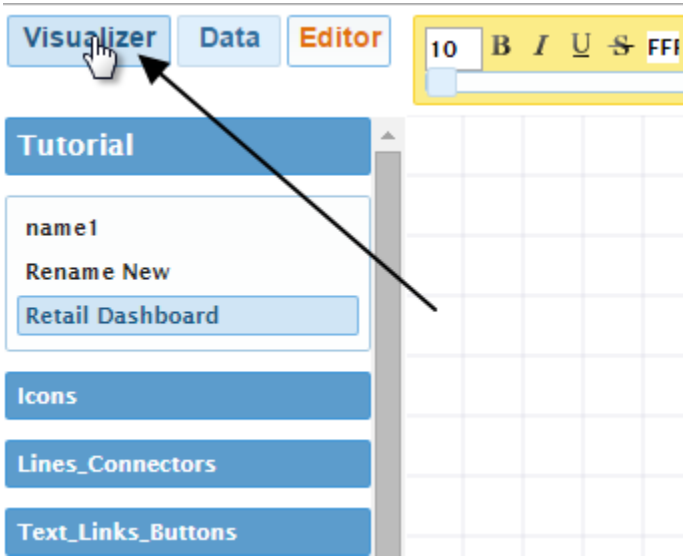
2. Select "New Page"

3. Give a name to dashboard

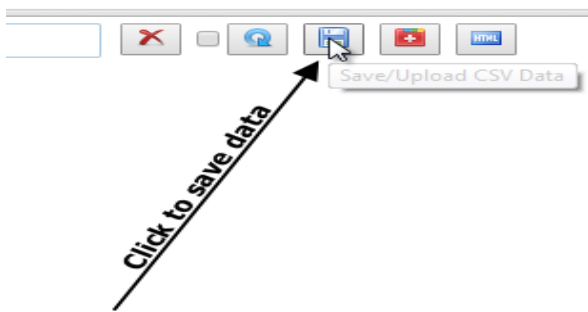


Let us call this "Retail Dashboard"

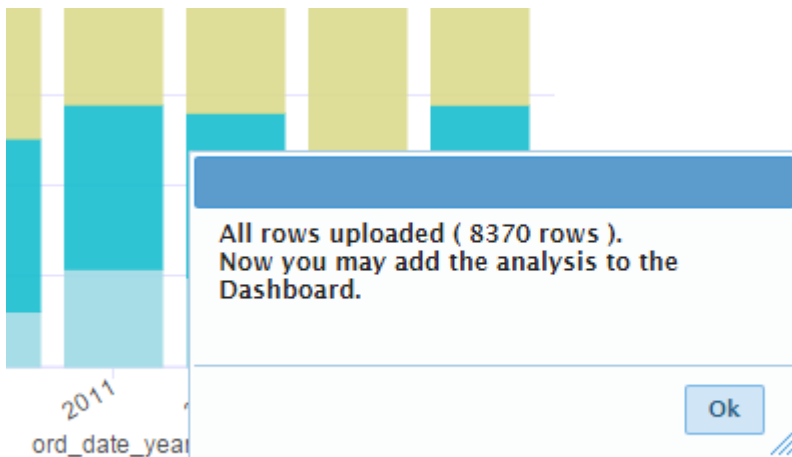
4. Switch to Visualizer Tab



5. Save Data



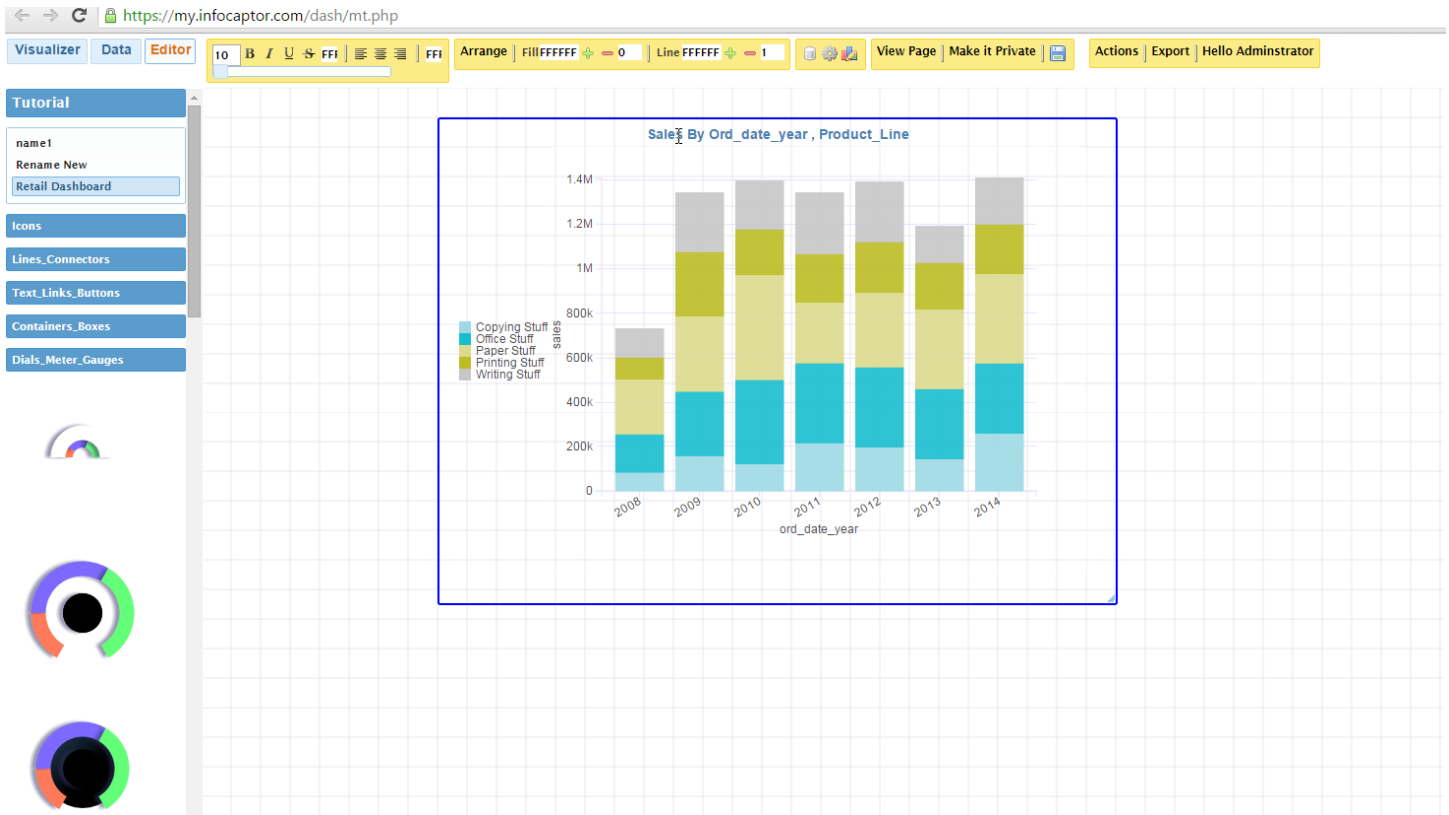
Confirmation of data load complete



6. Add analysis to dashboard

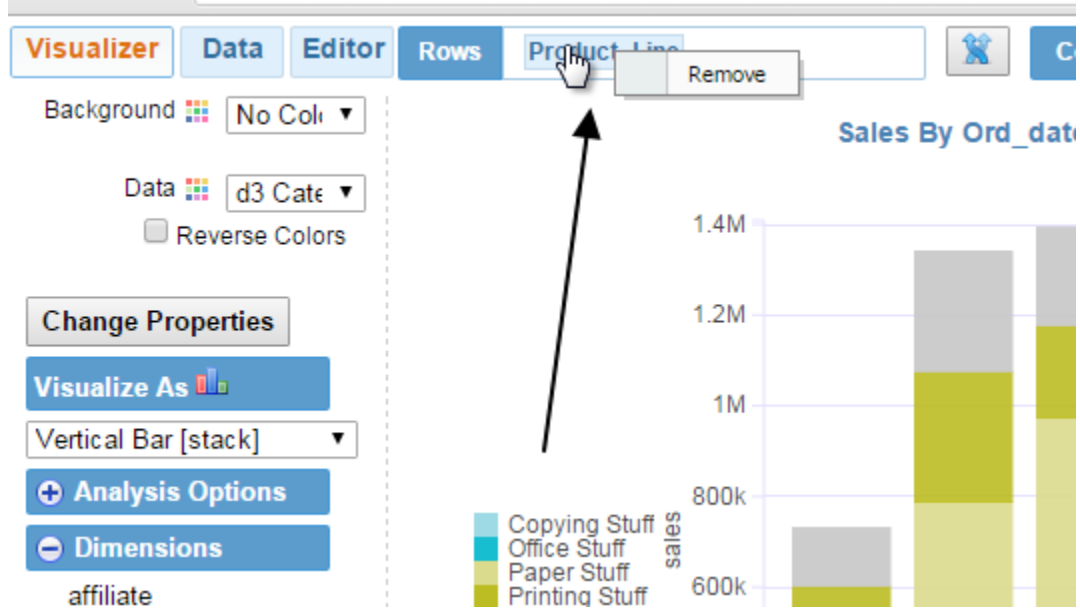


7. First chart on dashboard

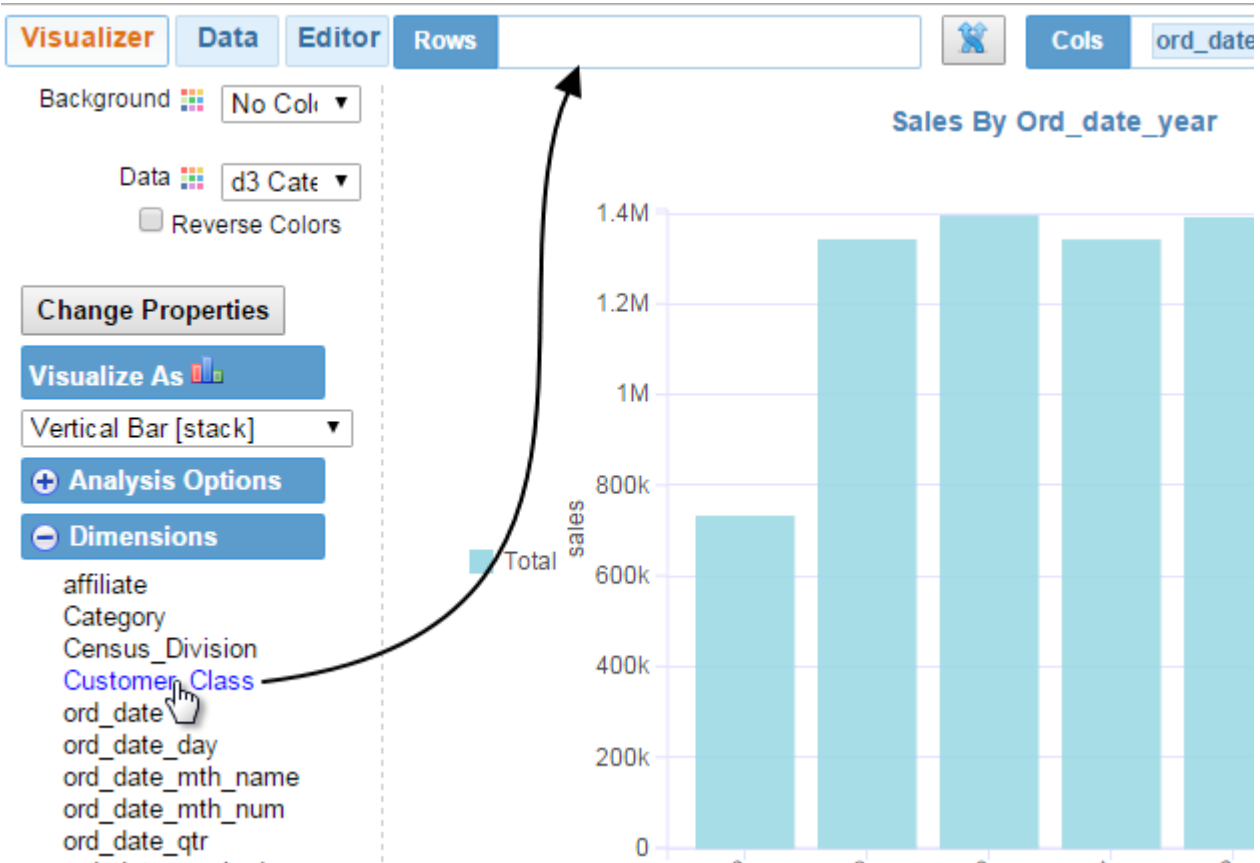


Build Chart 2 : Sales by year and Customer Class

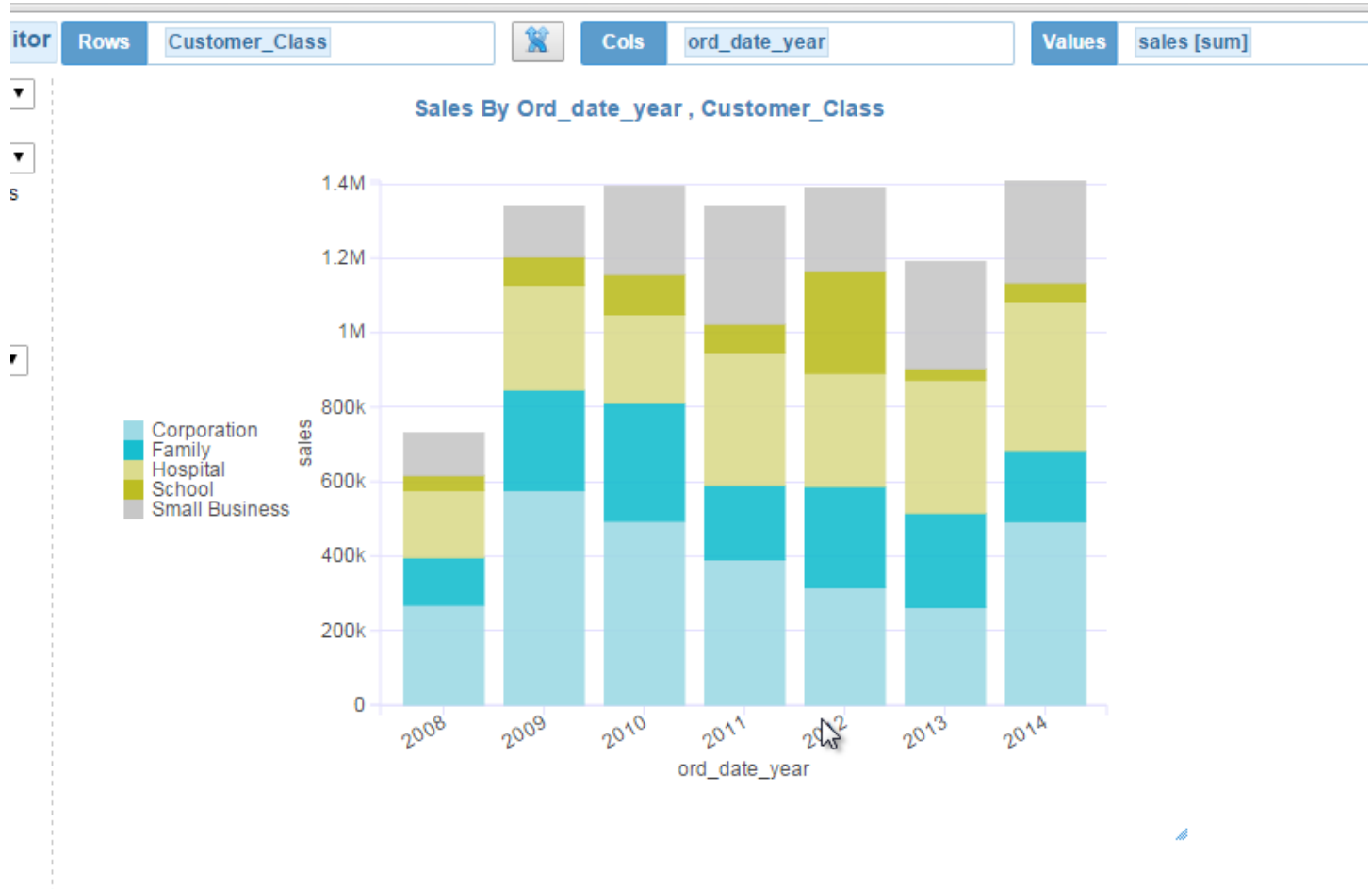
1. Switch to the Visualizer Tab
2. Remove the product line dimension from Rows bucket



3. Add Customer Class to Rows bucket



4. Chart 2 complete



5. Click on "Add analysis to dashboard button"



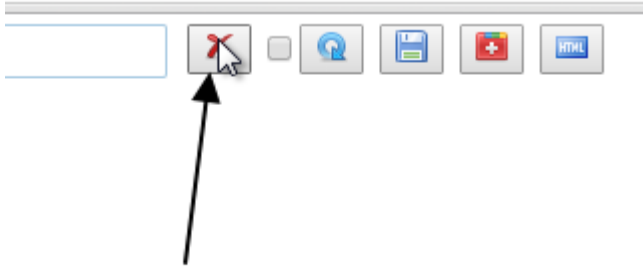
Note: We do not need to save the data for adding new charts to the dashboard. All charts on the same dashboard will be using the same data set that is already saved in prior step.

This completes two charts on the dashboard. As you notice the subsequent addition operation stacks the incoming chart just below the prior chart.

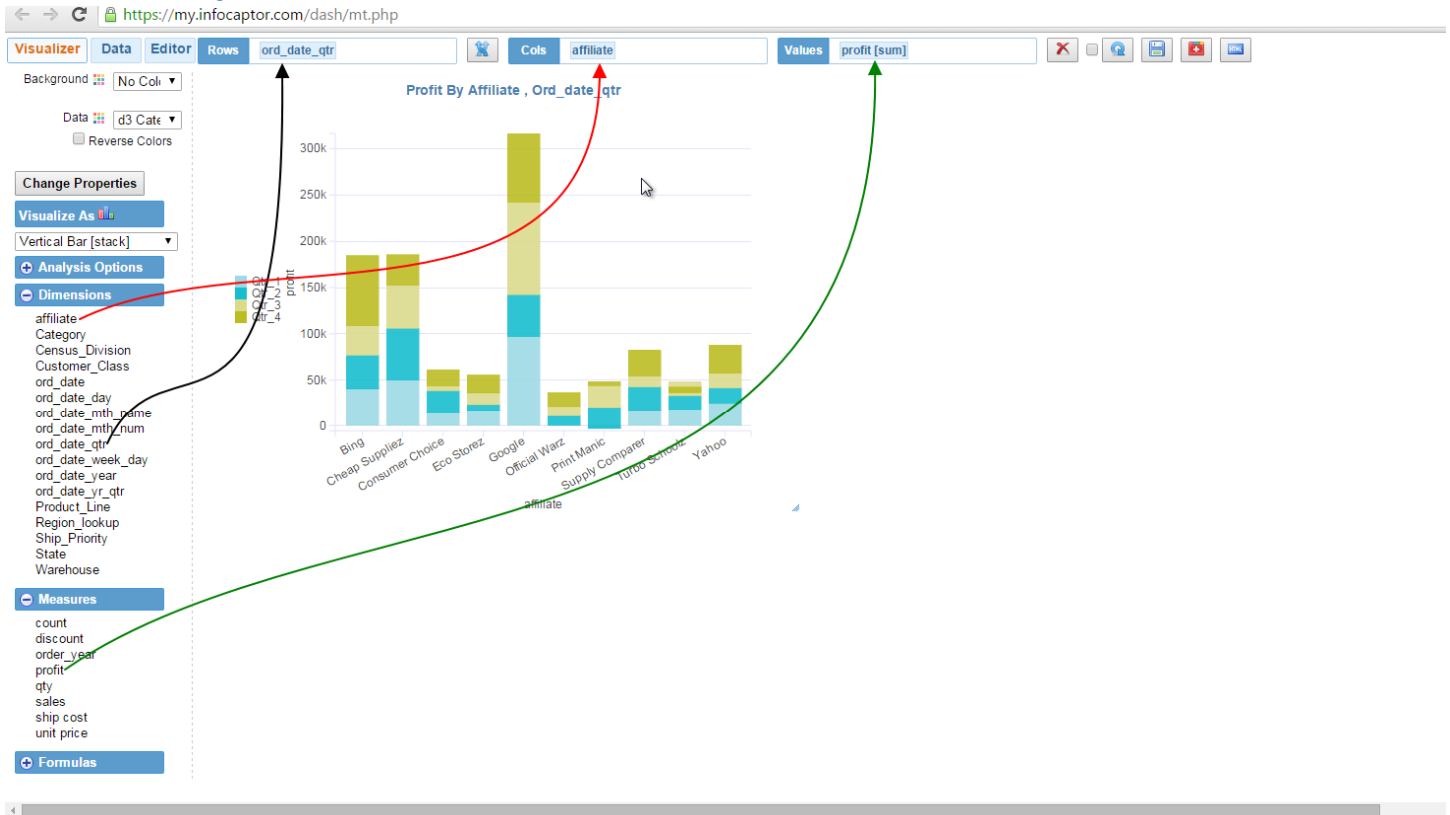
Build Chart 3 : Profit by affiliate and quarter

1. Switch to the Visualizer Tab

2. Reset the analysis



3. Build new analysis



Add ord_date_qtr to the Rows bucket

Add affiliate to the Cols bucket

Add profit to the Values bucket

4. Change legend position

The screenshot shows the Infocaptor interface with a stacked bar chart titled "Profit By Affiliate , Ord_date_qtr". The chart displays profit for various affiliates across four quarters (Qtr_1 to Qtr_4). The y-axis is labeled "profit" and ranges from 0 to 300k. The x-axis lists affiliates: Bing, Cheap Supplierz, Consumer Choice, Eco Storez, Google, Official Warz, Print Manic, Supply Comparer, Turbo Schoolz, and Yahooo.

The Properties panel on the right is open to the "Miscellaneous" section. The "Show Legend" option is set to "Inside". The "Legend X" value is -150. A red box highlights the "Show Legend" and "Legend X" options. Annotations with arrows point to these options and the "Change Properties" button.

Annotations:

- 1. click to change properties (points to "Change Properties" button)
- 2. look under Miscellaneous (points to the "Miscellaneous" section header)
- 3. Select "inside" for Show Legend (points to the "Inside" radio button)
- 4. Change X offset for the legend (points to the "Legend X" input field)

Affiliate	Qtr_1	Qtr_2	Qtr_3	Qtr_4
Bing	40k	40k	40k	40k
Cheap Supplierz	40k	40k	40k	40k
Consumer Choice	40k	40k	40k	40k
Eco Storez	40k	40k	40k	40k
Google	40k	40k	40k	40k
Official Warz	40k	40k	40k	40k
Print Manic	40k	40k	40k	40k
Supply Comparer	40k	40k	40k	40k
Turbo Schoolz	40k	40k	40k	40k
Yahooo	40k	40k	40k	40k

5. Change to Vertical group bar

Background No Colr ▾

Data d3 Cate ▾

Reverse Colors

Change Properties

Visualize As

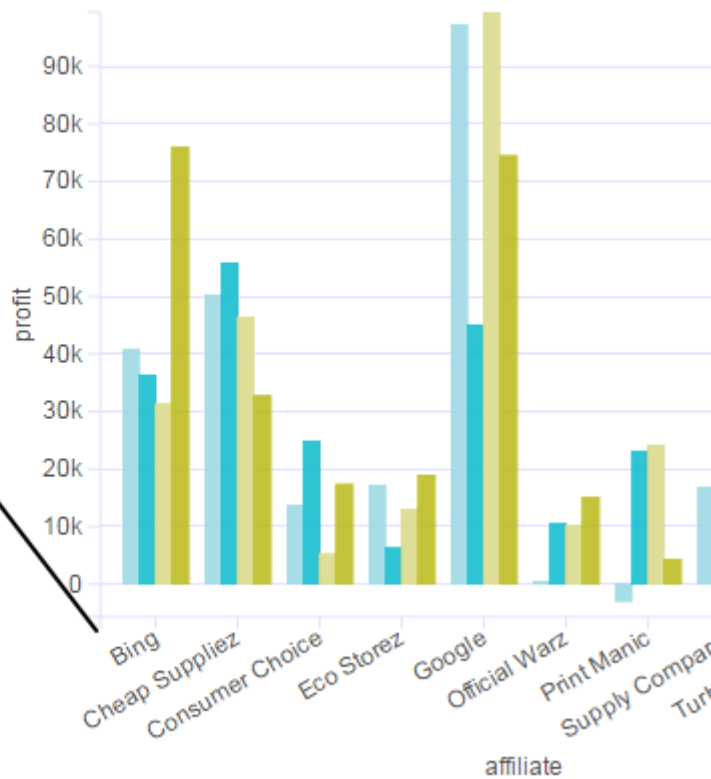
Vertical Bar [group] ▾

+ Analysis Options

- Dimensions

- affiliate
- Category
- Census_Division
- Customer_Class
- ord_date
- ord_date_day
- ord_date_mth_name
- ord_date_mth_num
- ord_date_qtr
- ord_date_week_day
- ord_date_year
- ord_date_yr_qtr
- Product_Line
- Region_lookup

Profit By Affiliate , Ord_date_c



6. Change color palette

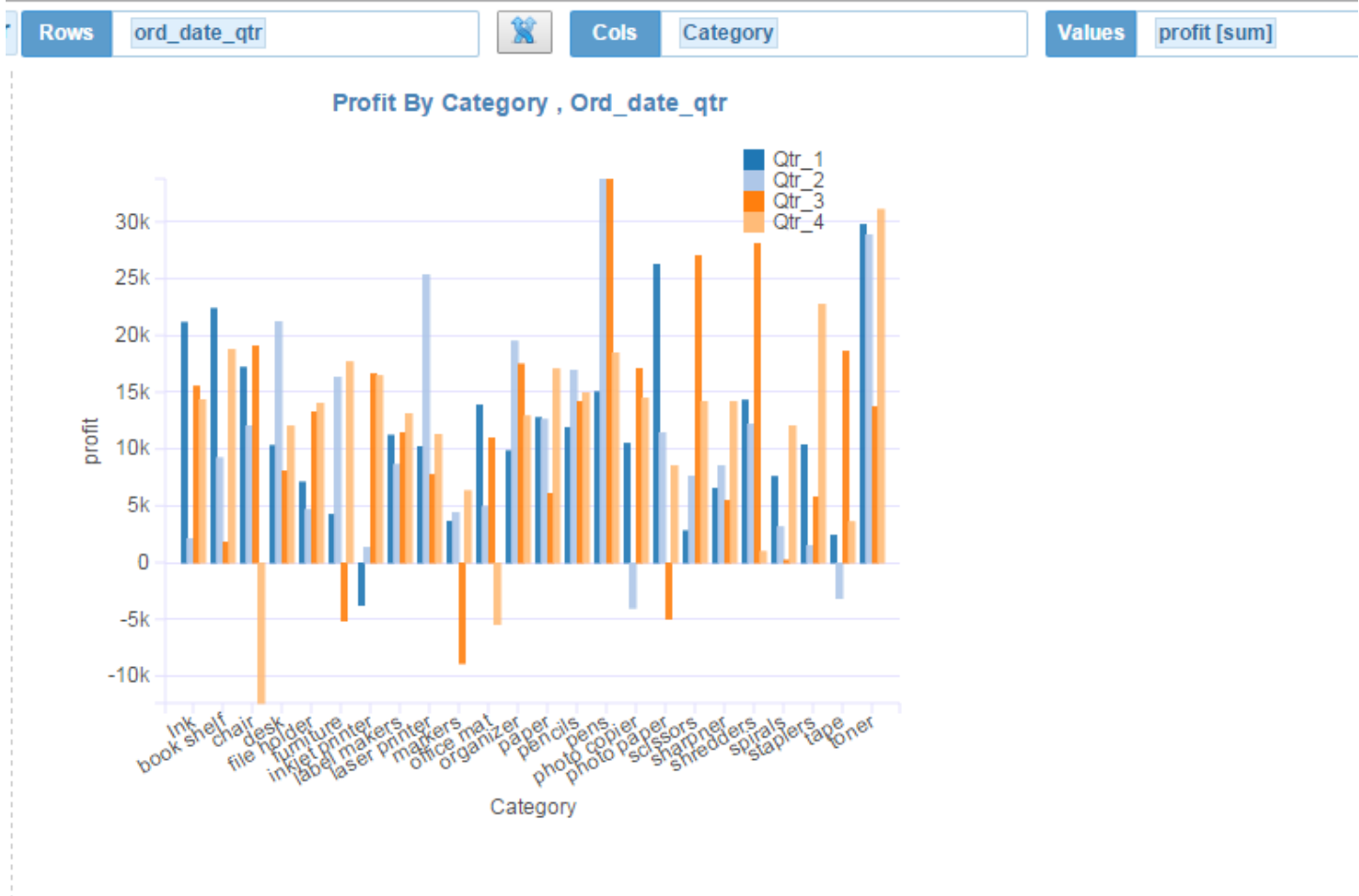
The screenshot shows a dashboard interface with a bar chart and a color picker dialog. The chart is titled "Profit By Affiliate, Ord_date_qtr" and shows profit values for various affiliates across four quarters (Qtr_1, Qtr_2, Qtr_3, Qtr_4). The y-axis represents profit, ranging from 0 to 90k. The x-axis lists affiliates: Bing, Cheap Supplierz, Consumer Choice, Eco Storez, Google, Official Warz, Print Manic, Supply Comparer, Turbo Schools, and Yahoo. The color picker dialog, titled "Data Color Picker", is open, showing a list of color palettes. The "d3 Category20" palette is selected. Annotations "1. Invoke Color Picker" and "2. change color palette" point to the dialog box.

affiliate	Qtr_1	Qtr_2	Qtr_3	Qtr_4
Bing	40k	30k	75k	30k
Cheap Supplierz	50k	55k	45k	30k
Consumer Choice	25k	15k	15k	15k
Eco Storez	15k	15k	15k	15k
Google	95k	95k	75k	15k
Official Warz	10k	10k	15k	15k
Print Manic	25k	25k	25k	15k
Supply Comparer	15k	15k	15k	15k
Turbo Schools	15k	15k	15k	15k
Yahoo	25k	15k	15k	30k

7. Add analysis to dashboard

Build Chart 4 : Profit by Category and quarter

- 1. Remove "affiliate" from Cols bucket
- 2. Add "Category" to Cols bucket

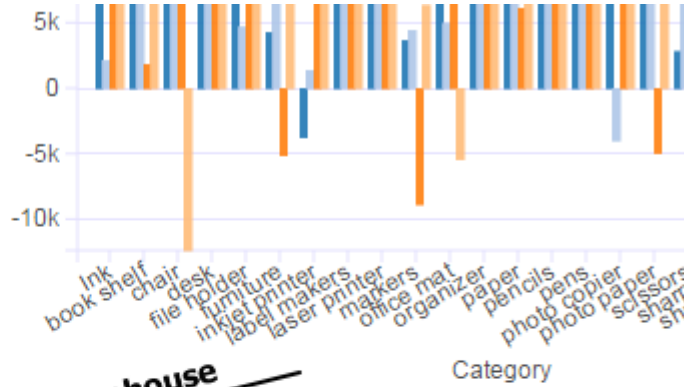


- 3. Add this chart to the dashboard

Build Parameter 1 : Radio control for Warehouse

- 1. Right click on Warehouse
- 2. Select 'Create Parameter'

affiliate
Category
Census_Division
Customer_Class
ord_date
ord_date_day
ord_date_mth_name
ord_date_mth_num
ord_date_qtr
ord_date_week_day
ord_date_year
ord_date_yr_qtr
Product_Line
Region_lookup
Ship_Priority
State
Warehouse



1. right click on Warehouse

2. select "Create Parameter"

- Filter
- Create Parameter**
- Create Date Hierarchy
- Change Data type to String
- Change Data type to Number

3. Select "Radio" control

Filter Condition
✕

Field :Warehouse

Shift/Ctrl + mouse click for multiple selection

Central W05
North West W01
South West W02
North East W03
South East W04

Checkbox
 Radio button
 Single Select
 Multiple Select

Add as Parameter to Dashboard

4. Click on "Add as Parameter to Dashboard"

← → ↻ <https://my.infocaptor.com/dash/mt.php>
Visualizer Data Editor

10 B I U ↶ ↷ 3D
Arrange Fill4682B4 → 1 Line4682B4 → 2
View Page Make it Private
Actions Export Hello Administrator

Tutorial

name1
Rename New
Retail Dashboard

Icons

Lines_Connectors

Text_Links_Buttons

Containers_Boxes

Dials_Meter_Gauges

Warehouse

- All
- Central W05
- North West W01
- South West W02
- North East W03
- South East W04

Sales By Ord_date_year , Product_Line

Profit By Affiliate ,

Sales By Ord_date_year , Customer_Class

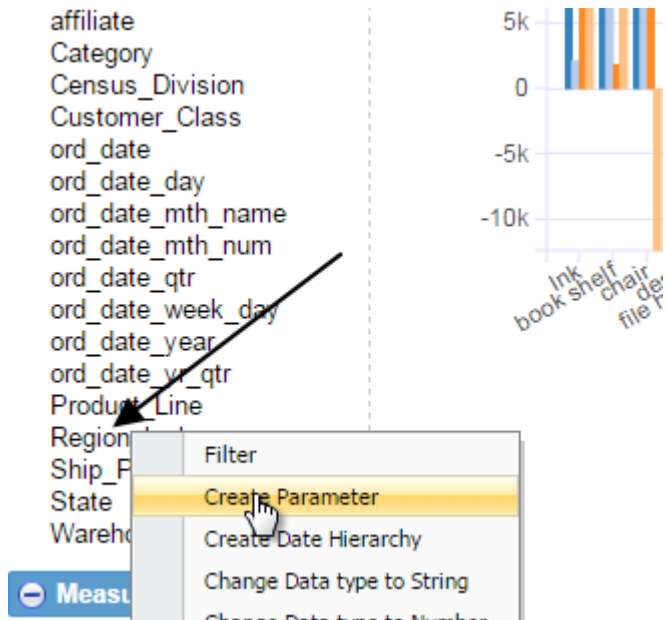
Profit By Category ,

Infocaptor.com

Page 25 of 28

Build Parameter 2 : Checkbox control for Region

1. Switch to the visualizer Tab
2. Right click on Region Lookup
3. Select "Create Parameter"



4. click "Add as Parameter to Dashboard"

Filter Condition [X]

Field :Region_lookup

Shift/Ctrl + mouse click for multiple selection

Midwest
Northeast
South
West

Checkbox Radio button Single Select Multiple Select

Add as Parameter to Dashboard

Data Editor | 10 | B I U S 3D | Arrange | Fill 4682B4 + - 1 | Line 4682B4 + - 2

Warehouse

- All
- Central W05
- North West W01
- South West W02
- North East W03
- South East W04

Region_lookup

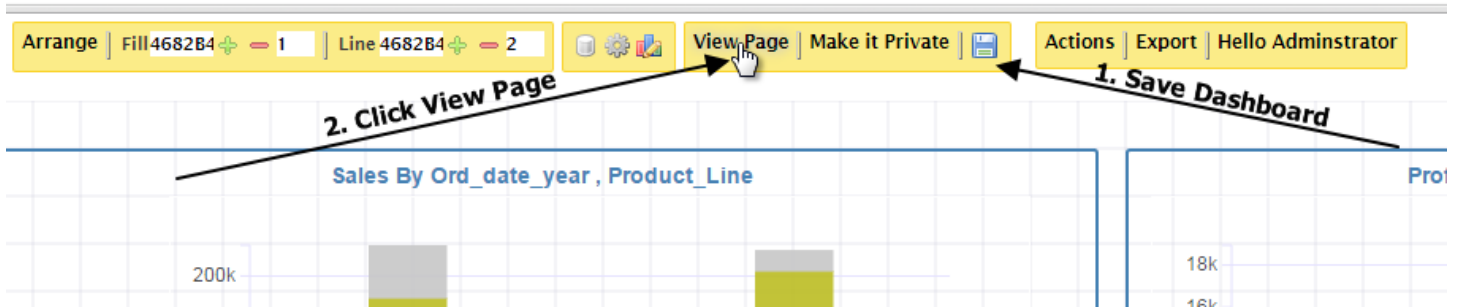
- All
- Midwest
- Northeast
- South
- West

Sales By Ord_date_year , l

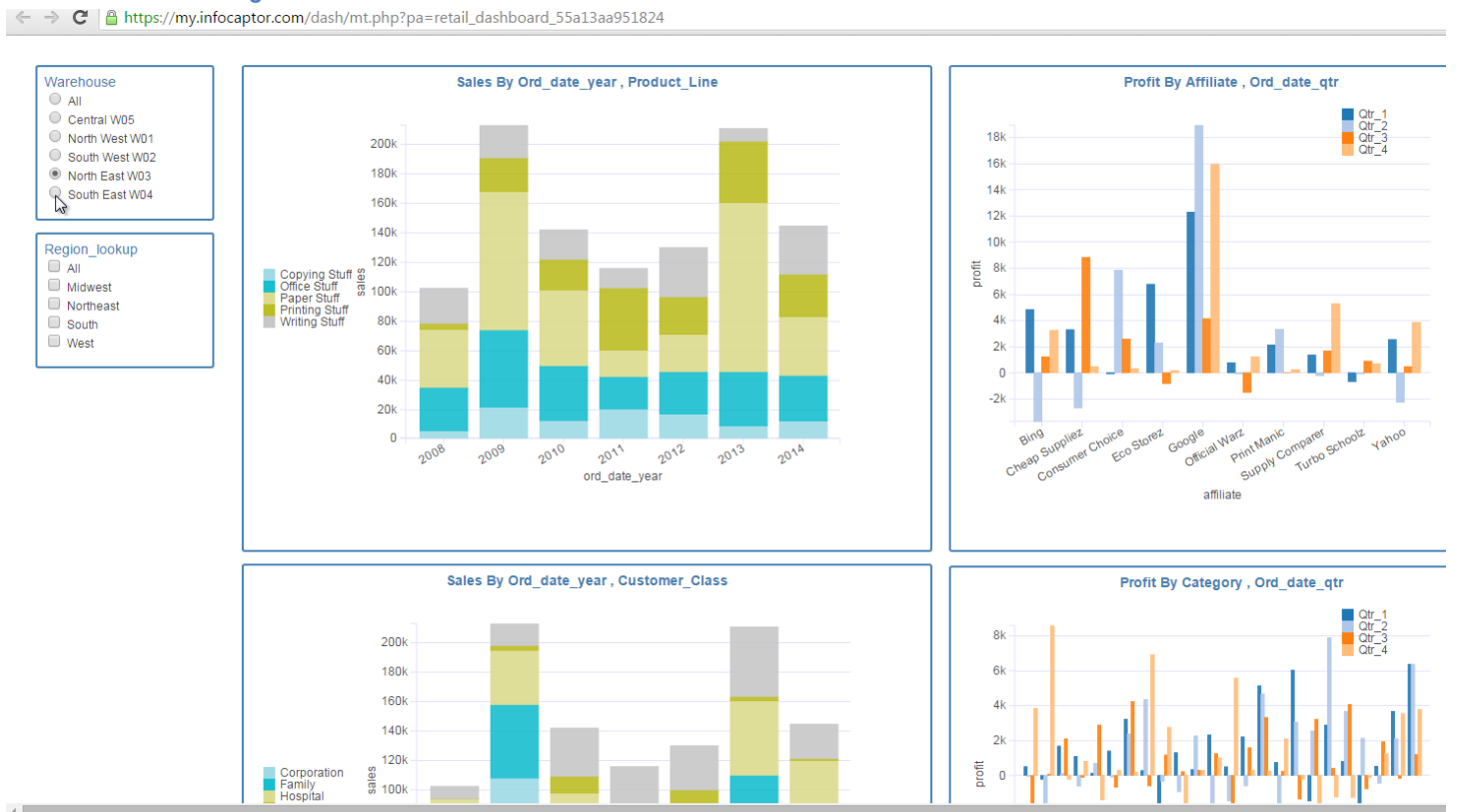
Year	Copying Stuff	Office Stuff	Paper Stuff	Printing Stuff	Writing Stuff
2008	5k	30k	40k	5k	25k
2009	20k	55k	95k	20k	15k
2010	10k	40k	50k	20k	20k
2011	15k	25k	15k	45k	10k

Save the Dashboard and Publish

1. Click on the Save button to save the dashboard



2. Click on "View Page" to view dashboard



Checkout the complete video tutorial : <https://vimeo.com/133233689>

Here is the interactive dashboard we just finished building in this tutorial

https://my.infocaptor.com/dash/mt.php?pa=retail_dashboard_55a13aa951824