

Business Intelligence

Quick Start

Product Documentation



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Quick Start

Last updated: 2025-09-19 14:51:17

Tencent Cloud Business Intelligence (BI) is an agile, self-service data analysis product that offers end-to-end BI capabilities from data access to model analysis and visual data display. It can effectively integrate enterprise multi-business data sources to help operators quickly obtain a data-driven basis for decision-making. Users can complete complex report output processes through simple drag-and-drop operations and quickly implement collaboration scenarios, including report sharing, pushing, and interactive comments.

ⓘ Note:

If you have not activated the BI service, you can activate it in the following ways:

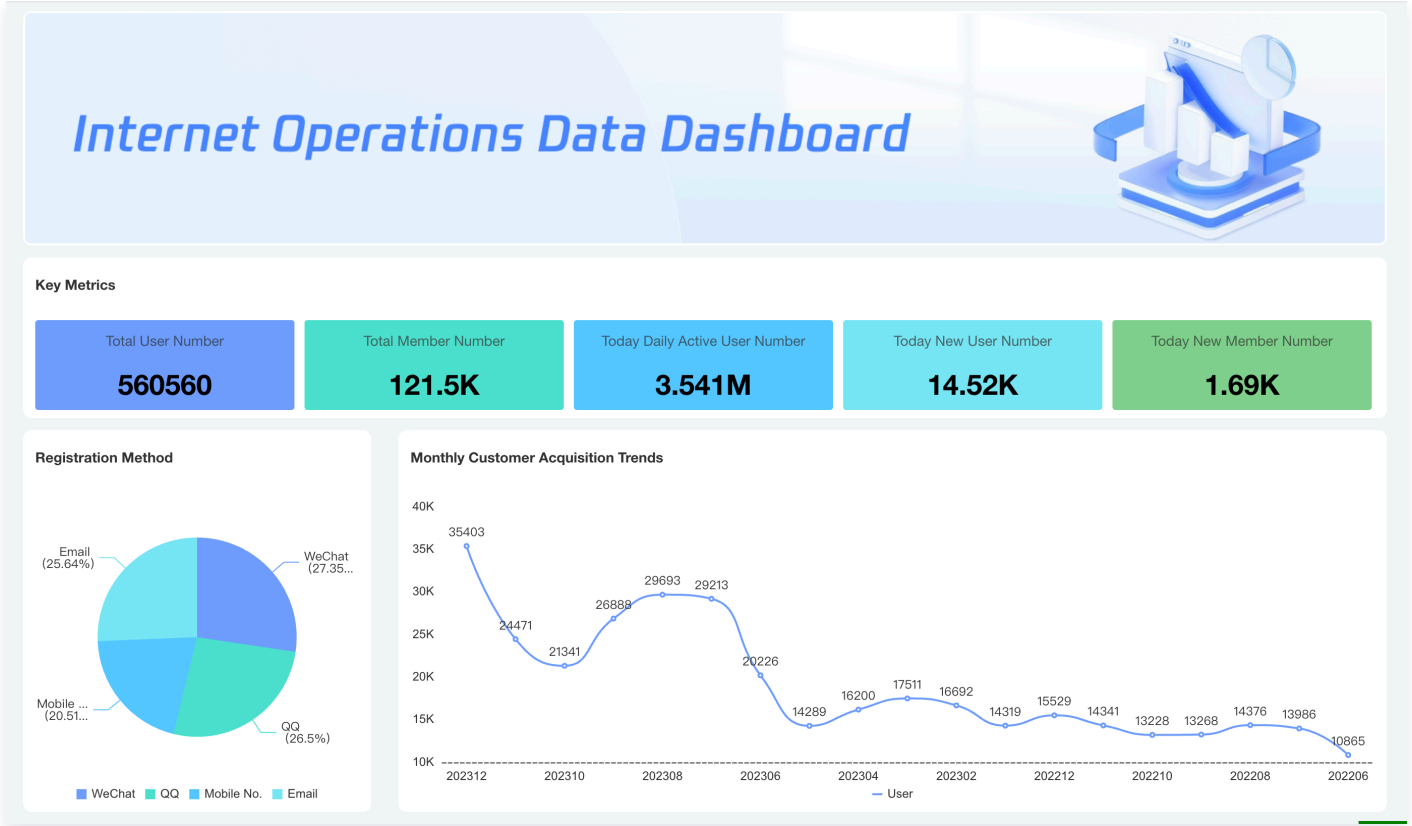
Go to the BI product introduction page, select an edition for purchase and activation, then click [buy now](#). Alternatively, go to the BI console, then click [apply now](#) to apply for a 1-month trial license.

1. Overview

To help you quickly learn and use BI and better experience its value in data analysis and data visualization, the example of creating an internet operations data dashboard will guide you through your Tencent Cloud BI journey.

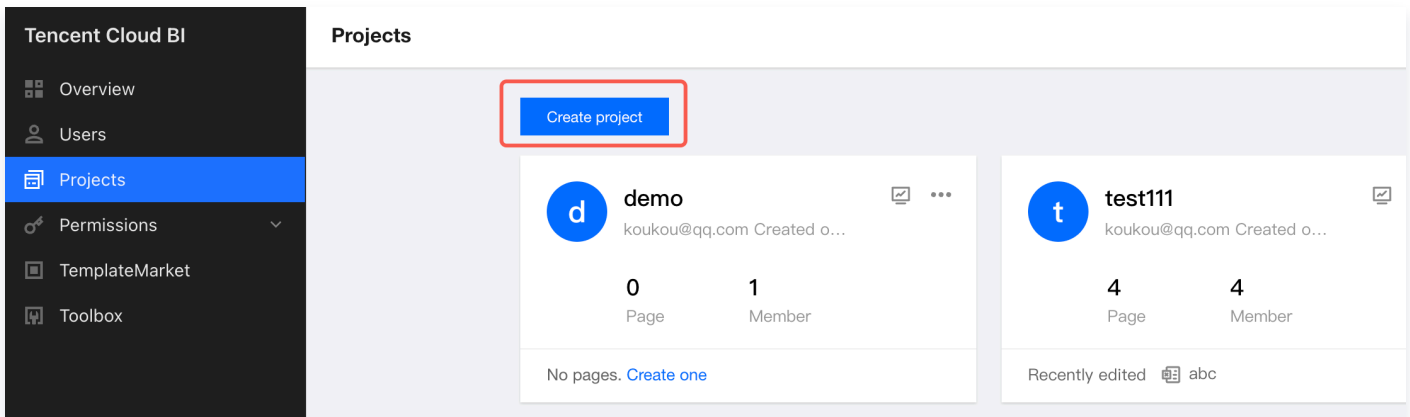
Requirement Description	Chart Type
Core Metrics Overview	Metric card
Registration Method	Pie chart
Monthly customer acquisition trend	Line Chart

Display effect

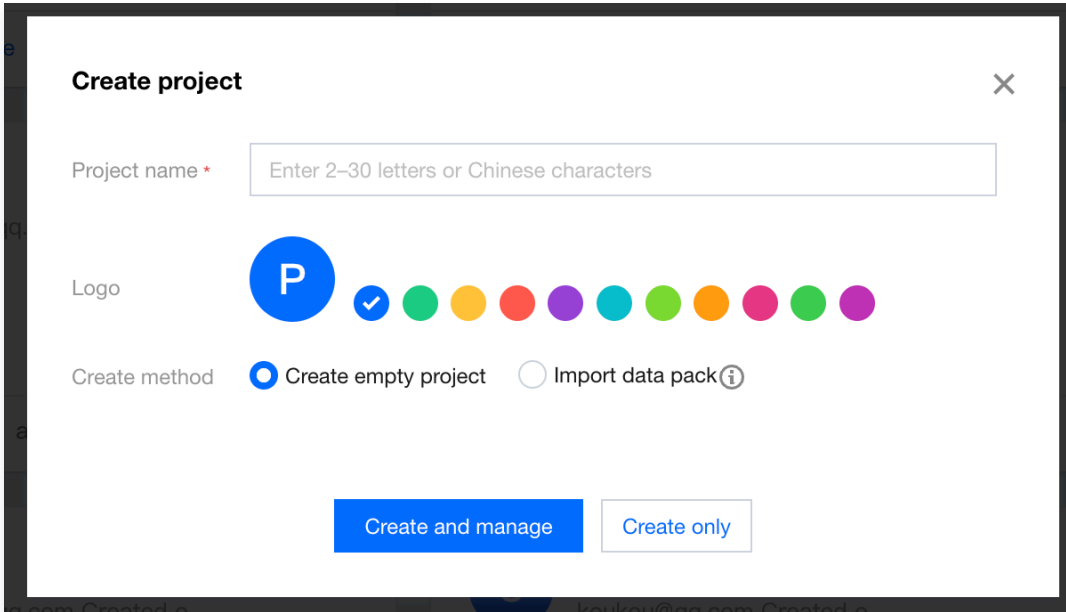


2. Project Creation

Go to the [BI console](#), select "project management" from the left sidebar, and click **create project**.



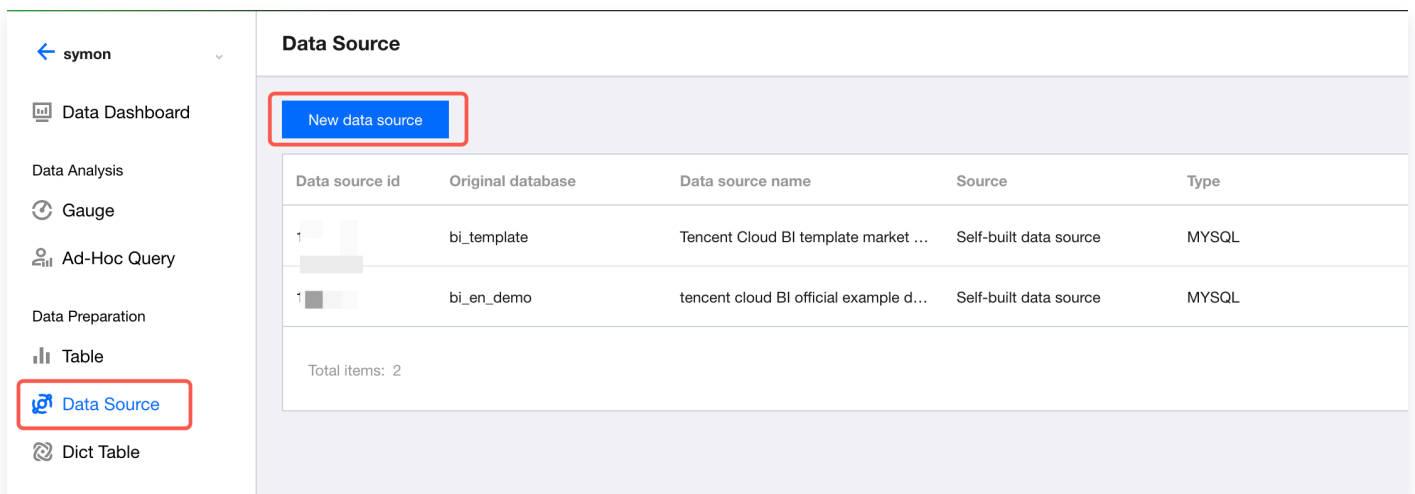
Enter the project name in the project window, then click the **Create and Enter Management** button.



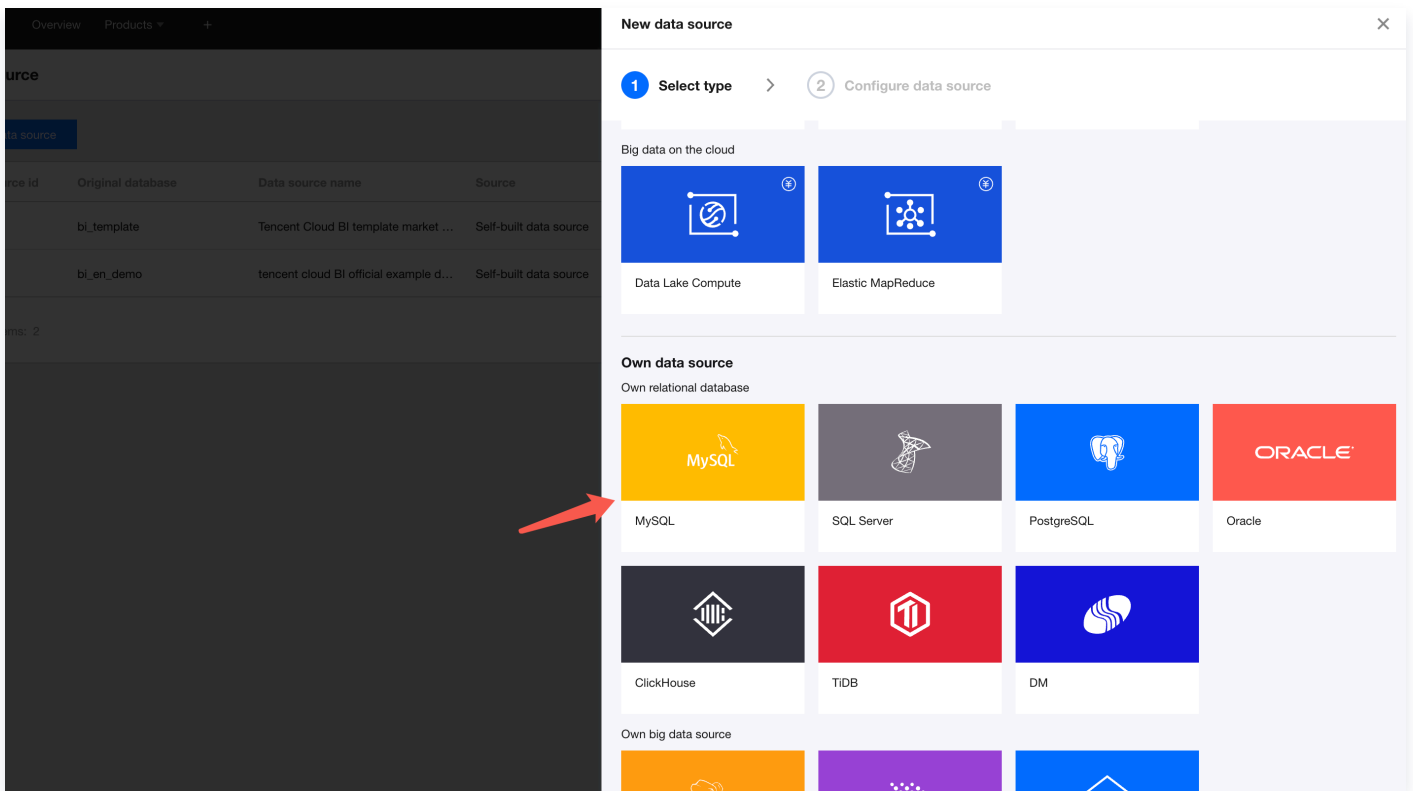
3. Data Source Connections

After entering into the project space page, if the dashboard data is stored in the MySQL database, first connect to this data source.

Click **Data Source** in the project space, then click **Create Data Source**:



After clicking, a drawer will open on the right. Select "MySQL" under "proprietary data sources".



Enter the following connection parameters:

Parameter	Content
Data Source Display Name	Demo data source
Data Source Address	bj-cynosdbmysql-grp-002r6k70.sql.tencentcdb.com
Port	29545
Encoding	utf8
Database Name	bi_en_demo
Username	demo
Password	demo#123Abc

After confirming that the connection parameters are correct, click **one-click testing**. The **"Database Connected Successfully"** text information will be displayed, indicating a successful connection to the data source.

New data source

1 Select type > 2 Configure data source

Data source name

Data source address

Port

Encoding

Database name

Username

Password

VPC Data Source

[Previous](#) [Quick test](#) [Confirm](#)

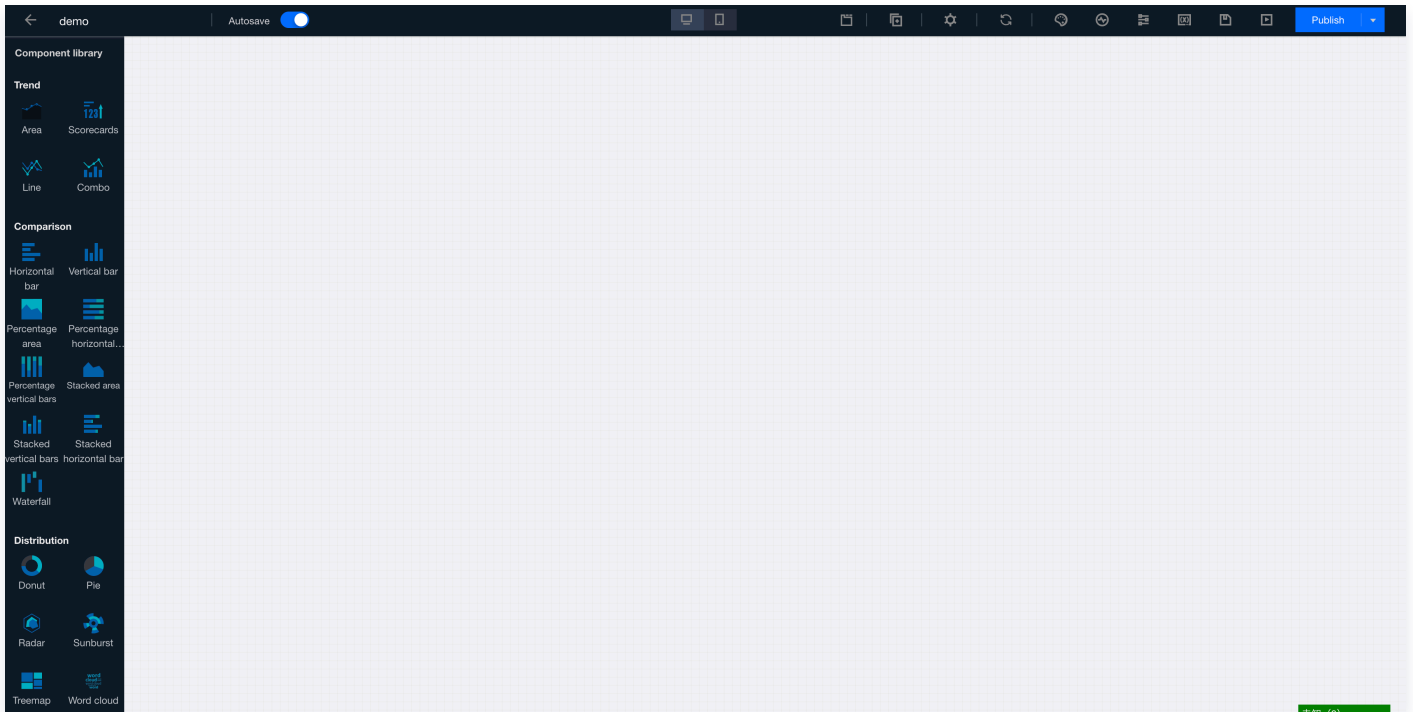
4. Page Building

4.1. Creating a Page

In the page building section, first click **"Dashboard"** to go to the page list. Then click the **Create Page** button, enter the dashboard name, and click **OK** to enter into the canvas editing interface.

The left side of the page editing canvas interface is the component library of the BI product, including trend, comparison, distribution, table, relationship, metric, map, interaction, and rich text components.

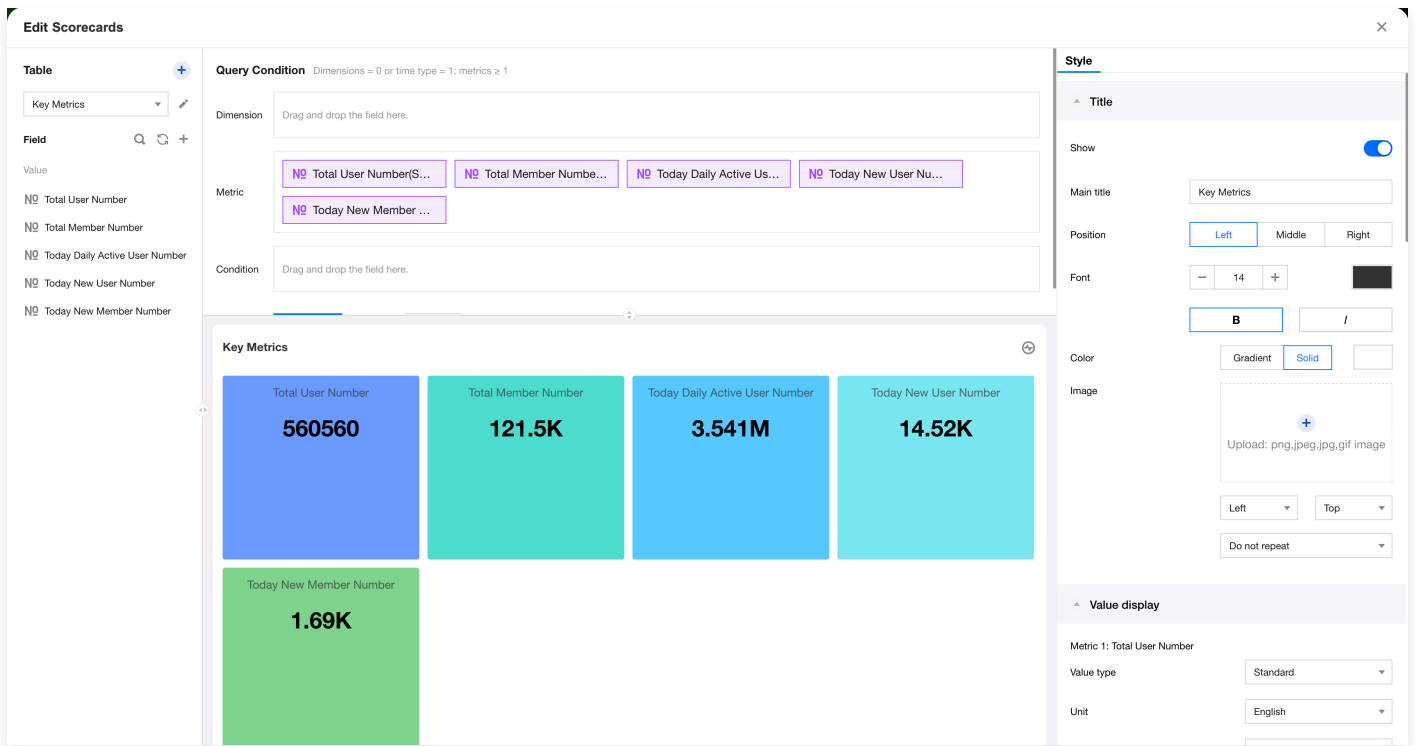
This library can meet user diverse needs in various data analysis and data visualization scenarios.



4.2. Key Metrics Overview

First, let's produce the core metrics overview component. Click the **"Metric card"** component in the left-side component library, and drag and drop it onto the canvas on the right to automatically proceed to the metric card editing view.

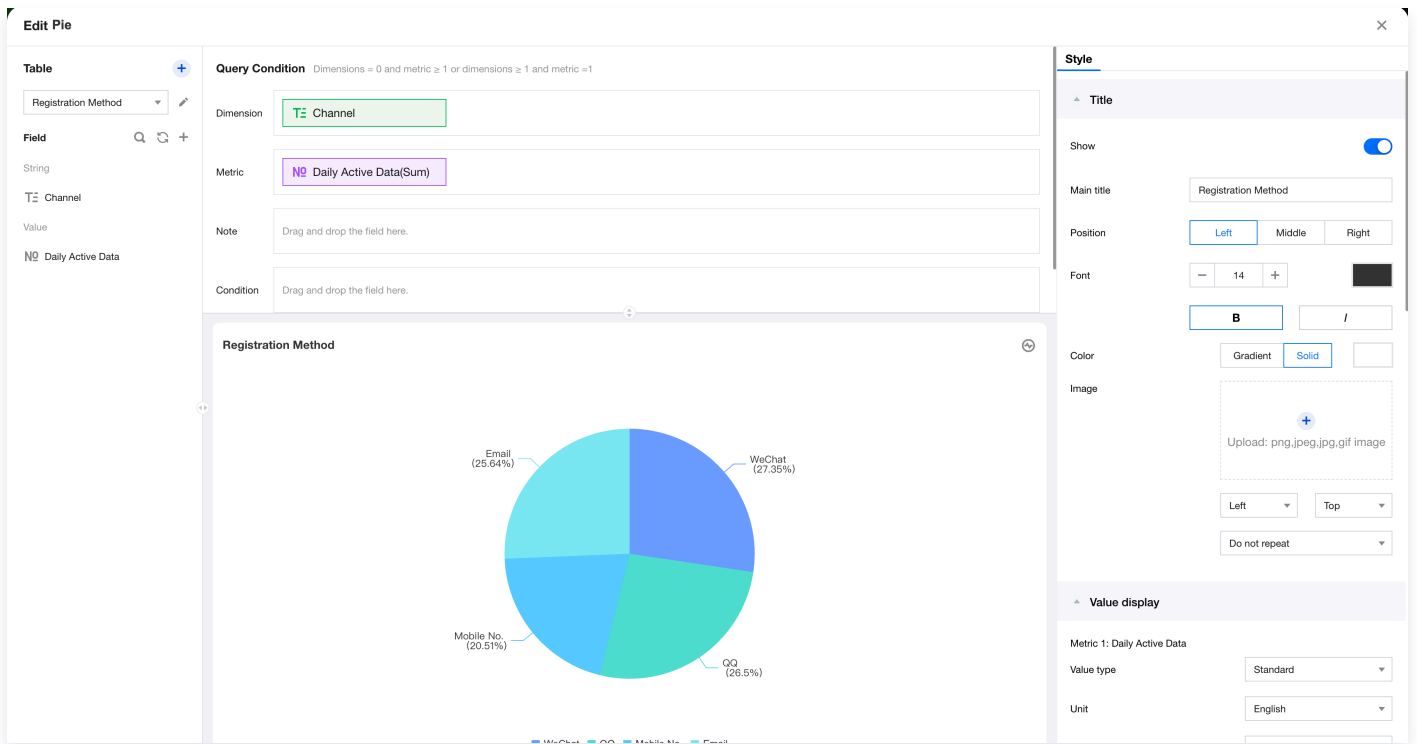
- Field drag and drop: **Select a data table**, then drag and drop the numeric fields to be analyzed into the indicator area. Select the aggregation method as needed (**hover over the field to select an aggregation method**).
- Style adjustment: On the right-side **style** panel, set the value unit. Under **title**, enable **display**, and enter the title in **main title**.
- Component saving: Click **save** in the lower-left corner to complete the metric card production.



4.3. Registration Method

Let's produce a pie chart. Click the **pie chart** component in the left-side component library and drag it to the canvas on the right.

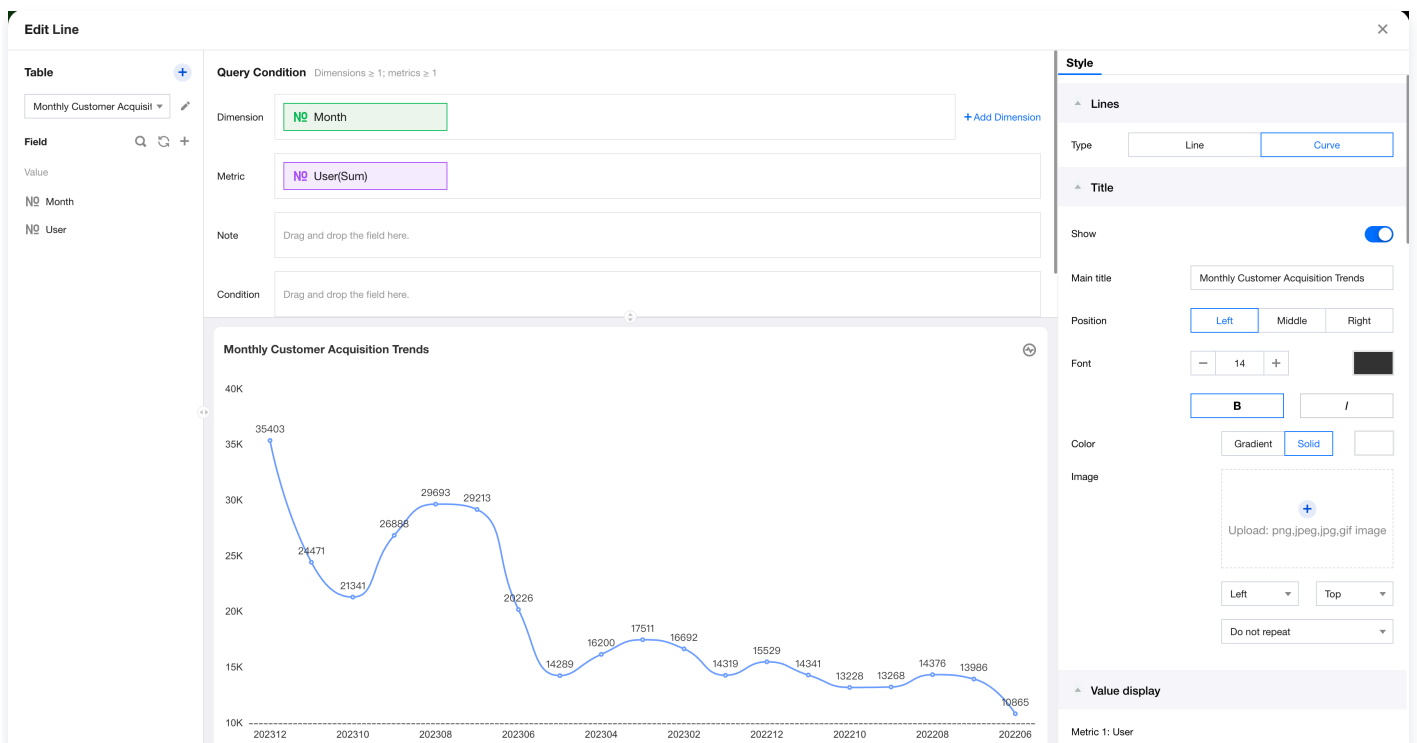
- Field drag and drop: Drag and drop the "channel" field to the dimension area, and the field to be analyzed to the metric area.
- Style adjustment: Modify the main title in the style component on the right, and enable the display of tags, data values, and percentages.
- Component saving: Click **save** in the lower-left corner to complete the pie chart production.



4.4. Monthly Customer Acquisition Trend

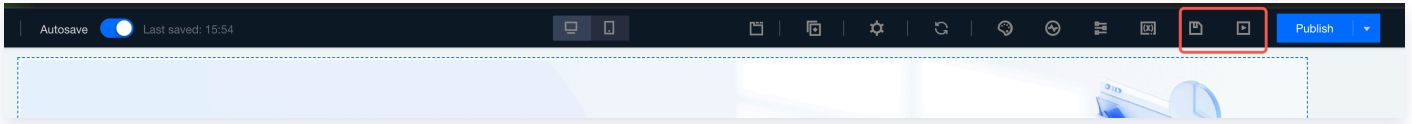
Next, add a line chart. Click the line chart component in the left-side component library and drag and drop it onto the canvas on the right.

- Configuration settings: Set the line type to orientation, dimension to month, and metric to number of users.
- Chart saving: Click **save** to complete the configuration.

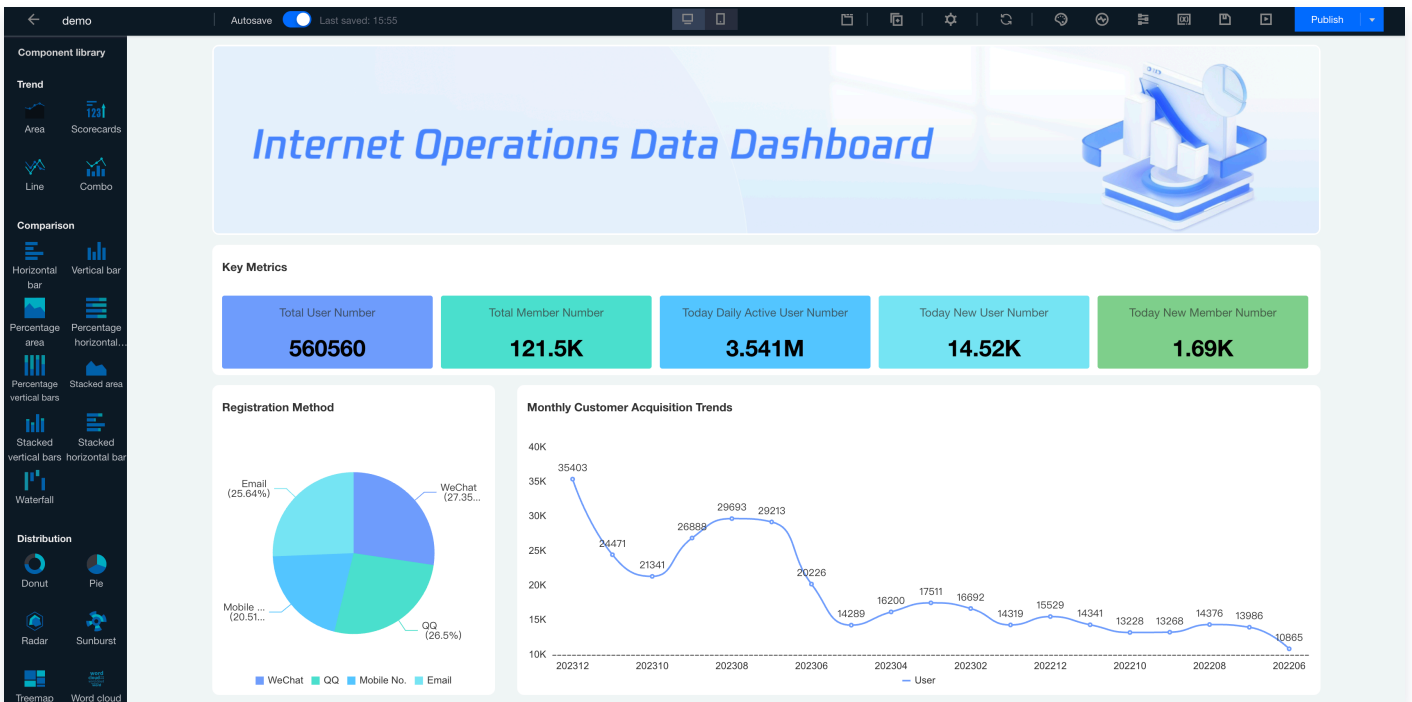


4.5. Adjusting Page Layout

Drag and drop the components on the page to adjust the page layout, then click the **Save** icon in the upper-right corner of the page. Click the **Preview** icon at the top to preview the page.



If the data analysis and display effects, as shown on the following page, are displayed, the overall page building is completed.

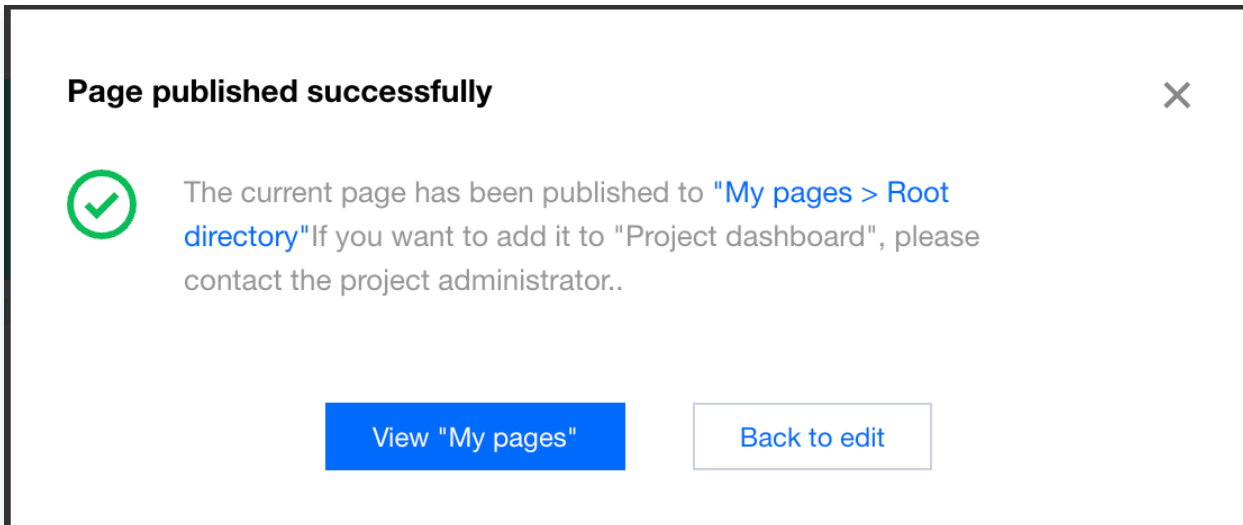


5. Publish and Share

After page building, click **Release** in the upper-right corner of the page to release the page.



Click **Release**, and you will see the pop-up window showing that the page was successfully released. Click **View "My" Dashboard**, and you will automatically be redirected to the **Data Dashboard** browsing page.

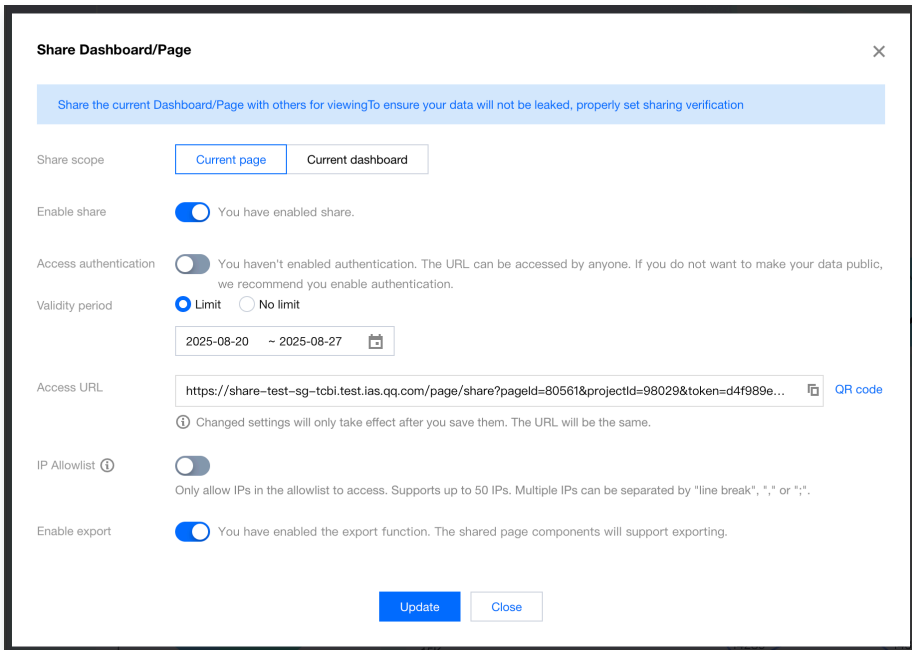


5.1. Data Dashboard Release and Sharing

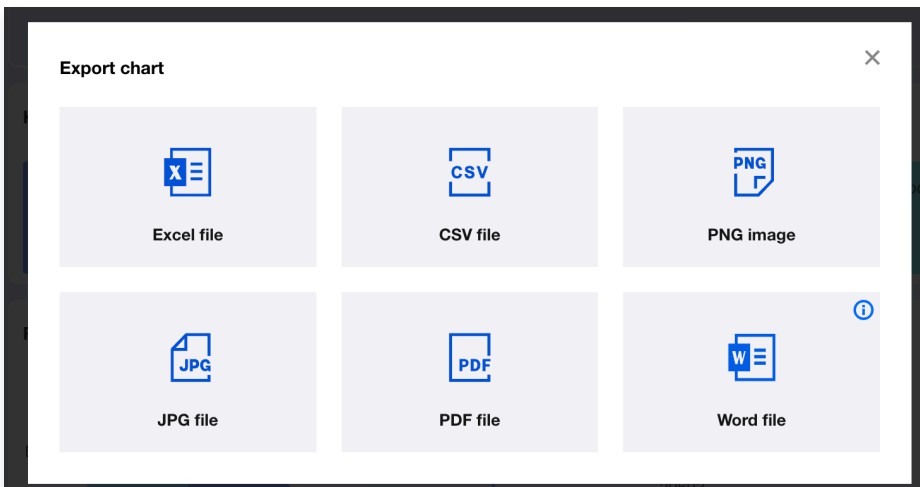
The "Edit", "Share", "Export", "Refresh Data", "Embed", "Decommission" icons in the upper-right corner of the data dashboard interface allow you to perform a series of operations on the dashboard or page.



- Click Edit: Redirect to the "dial" page to perform editing operations on the dashboard.
- Click Share: Enable the "Enable Sharing" switch to perform sharing settings.
 - Sharing Scope: Two sharing options are available, that is, the current page and the current dashboard.
 - Access Validation: Selectively enable "access validation" based on the data situation.
 - Validity Time: It is divided into limited time and unlimited time. Unlimited time means permanent sharing.
 - Access Link: Copy the link for sharing, or click the QR code for sharing.



- Click **Export**: Exporting pages as files is supported. Currently, the **Excel file**, **CSV file**, **PNG image**, **JPG file**, and **PDF file** formats are available.



- Click **Embed**: Tokens can be generated for embedding settings and sharing.

Embed settings

To reduce data leakage risk, it is recommended to enable nested validation.
If you need to carry page parameters for filtering, please ensure the current version is the professional edition; otherwise, the settings will be invalid even if configured.

Embedded content: Current page Current dashboard

Enable embed: You have enabled embed.

Embed authentication: You have enabled authentication. Please follow the instructions below to complete the embed configuration.

Instructions:

- 1 Create an access token**
See [CreateEmbedToken](#).
Note: The token expires every 10 minutes. After it expires, you need to extend its validity period as described below. Each token can be used for at most 240 minutes, beyond which a new token needs to be created. The same rules will apply to the new token.
Set access count, decrease by 1 after each use. Permissible range: 1-99999.
- 2 Assemble the embed URL**
Get the URL of the embed template:
`https://share-test-sg-tcbi.test.ias.qq.com/page/embed?authType=strong&pageId=80561&projectId=98029&scope=page&token=${Replace this with a valid token}&withHead=false&tclang=en`
Set the token field in the URL to the token created.
- 3 Extend the validity of the token**
See [ApplyEmbedInterval](#).

toolbar: Full screen Export data Self-service data retrieval

- Click Unpublish: Once clicked, the page cannot be viewed in the data dashboard, but it can still be viewed and edited in Page and can be published again.

Unpublish

After you unpublish the page, it can no longer be viewed in the dashboard. However, you can still view and edit it in "Page". If it is published again, it will become visible again in the dashboard.

5.2. Project Members

Click "project member", and you can configure project members and grant permissions as needed. Permissions can include project administrator, project editor, and project viewer.

The screenshot displays the 'Project Members' management page. On the left sidebar, the 'Project Members' option is highlighted under the 'Project Configuration' section. The main content area features a 'Manage members' button at the top left. Below it is a table with the following structure:

Account name	Account ID	Role	Operation
[Redacted]	[Redacted]	project administrator	Edit Remove

At the bottom of the table, it indicates 'Total items: 1' and a pagination control showing '10 / page' and '1 / 1 page'.

Congratulations on completing the entire quick start tutorial for Tencent Cloud BI product. We are excited to see how BI will empower you to work more efficiently and unlock greater value in your data analysis and visualization practices.