

# Business Intelligence Collaboration and Application Product Documentation





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## Collaboration and Application Push Channel Management WeCom App Authorization

Last updated: 2025-09-19 15:24:43

When the user's working environment is WeCom, the user can conveniently push information to the bound WeCom account via the WeCom app push feature. Make sure to complete the API authorization for the app before using the WeCom app push feature.

#### ① What is the difference between the WeCom app and WeCom Robot?

- 1. The WeCom app enables the targeted push of messages to WeCom users (a one-to-one message sending action). The advantage is security and control, but the downside is the potential impact of official policies (which might involve fees).
- 2. With the WeCom Robot, once a user subscribes to the robot, the user will receive push notifications (similar to subscribing to a broadcast radio station, where the broadcast is not limited to specific subscribers, making it a one-to-many messaging action). The advantage is convenience, while the downside is potential security risks. The WeCom Robot is mainly used for message push in non-sensitive data scenarios.

This document introduces the following operations:

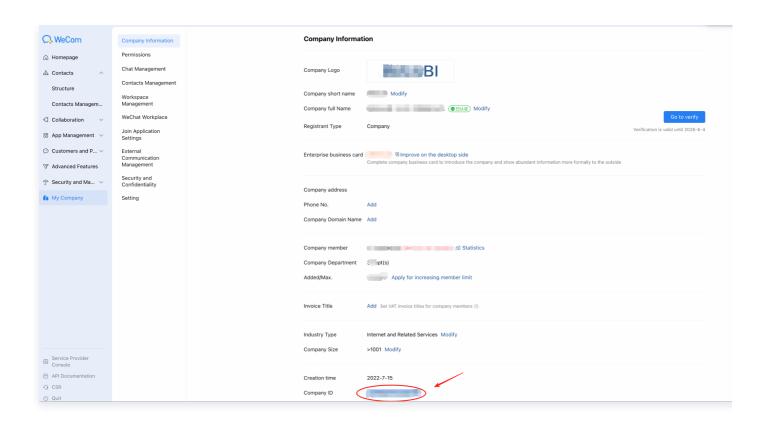
- Obtaining the CopID from the WeCom platform.
- Authorizing and activating the WeCom app in Bl.
- Binding the user's WeCom account.
- Viewing push records.

To use the WeCom app for message push, go to WeCom App Push.

#### Obtaining the CopID from the WeCom Platform

- 1. Prerequisite: The WeCom account has been registered, and the administrator's support is needed for the current operation.
- 2. Go to the WeCom Admin Backend > My Company > Company Information, and find the Company ID (CorpID).

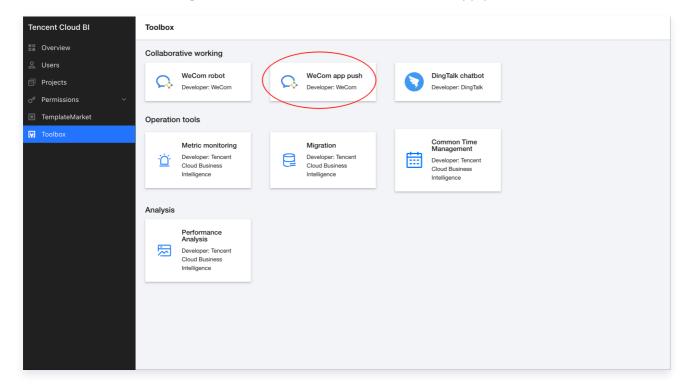




3. Copy the Company ID for later use.

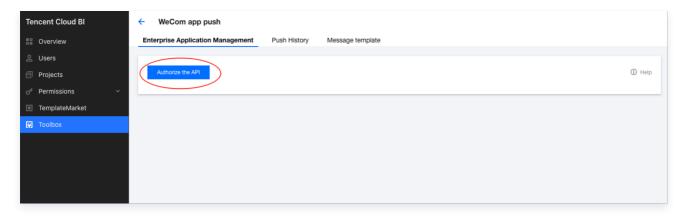
#### Authorizing and Activating the WeCom App in BI

1. Go to the Business Intelligence (BI) console > Toolbox > WeCom app push.

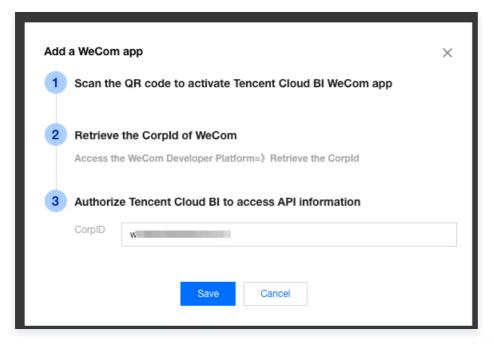


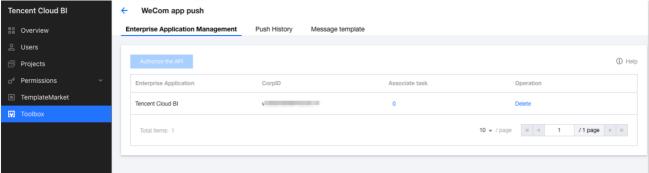


2. Click Authorize the API to start the authorization process.



3. Enter the previously obtained CorpID and submit to complete the API authorization process.



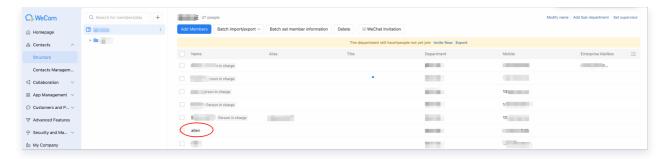


#### Binding the User's WeCom Account

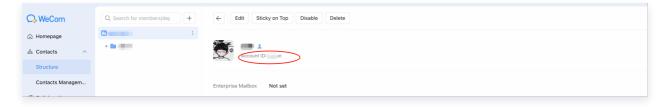
To use the WeCom push, users need to bind their WeCom account.

1. Go to the WeCom Admin Backend > Contacts.

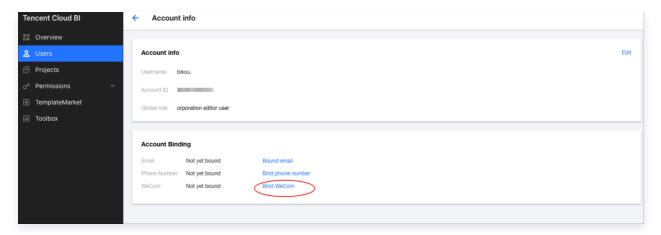




Obtain the WeCom account on the details page and copy the account for later use.



2. Go to the BI console > Users > the user list > Edit.

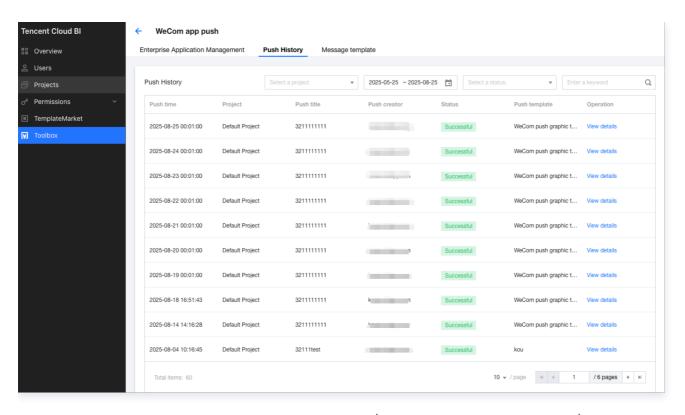


Enter the full WeCom account to search, select the user, and save.

#### Viewing Push Records

Go to Push Records to view the results of all WeCom app pushes. Users can filter the records by keywords, including project, status, and title.





Click View details to check the content sent this time (including the template content).



#### Note:

The availability of push channels eventually depends on whether they are supported in the user's located region and compatible with the user's work environment.





#### WeCom Robot Management

Last updated: 2025-09-19 15:24:43

When the user's working environment is WeCom, the user can easily subscribe to report push notifications through the WeCom Robot. To use the WeCom Robot for push notifications, the robot information needs to be registered on the platform beforehand.

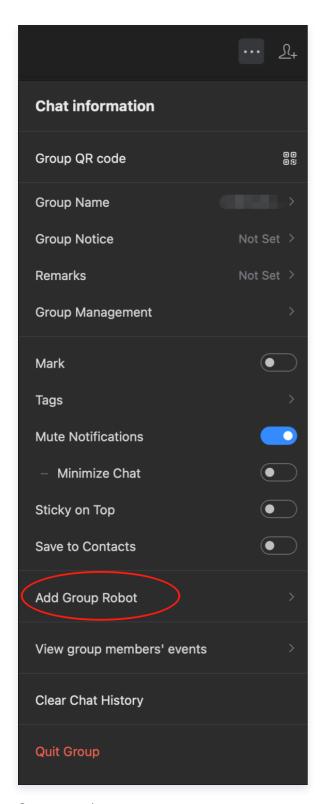
This document introduces the following operations:

- Obtaining the WeCom Robot Webhook URL.
- Adding the WeCom Robot in Bl.
- Enabling or disabling the WeCom Robot.
- Viewing push records.

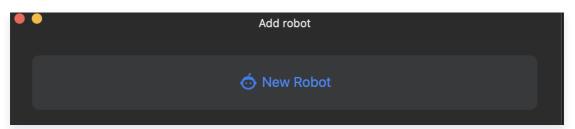
#### Obtaining the WeCom Robot Webhook URL

- Prerequisite: The current edition of WeCom needs to support the robots (the WeCom private deployment edition does not support the robots). For more information about the WeCom Robot, visit the WeCom Developer Center.
- 2. Create a group in WeCom and add the robot to the group.



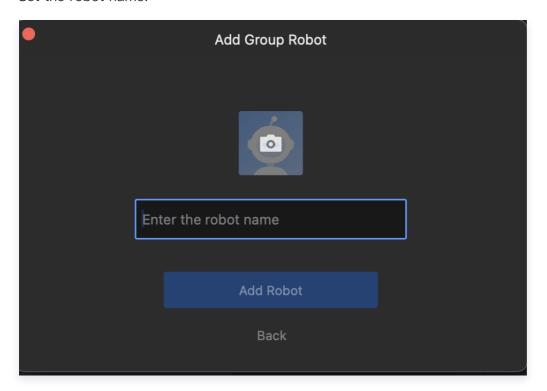


Create a robot.

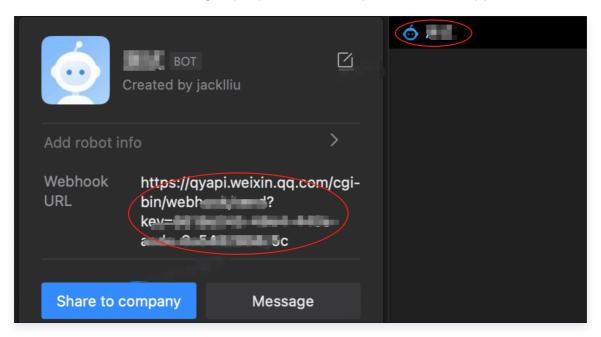




Set the robot name.



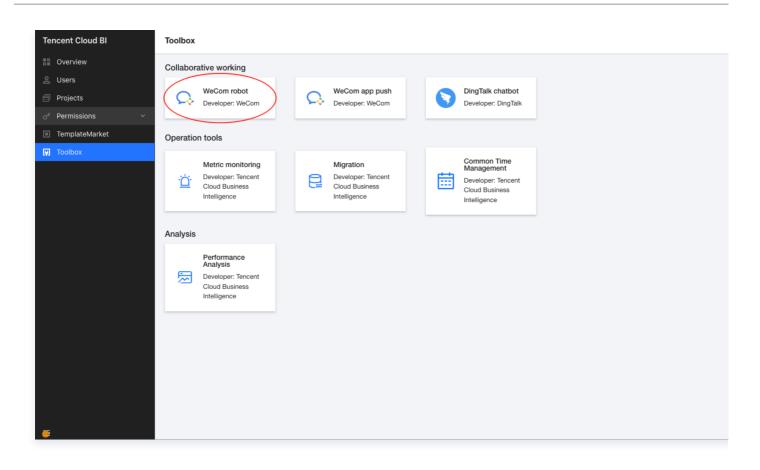
3. Obtain the robot URL. In the group, open the robot's profile card to copy the webhook URL.



#### Adding the WeCom Robot in BI

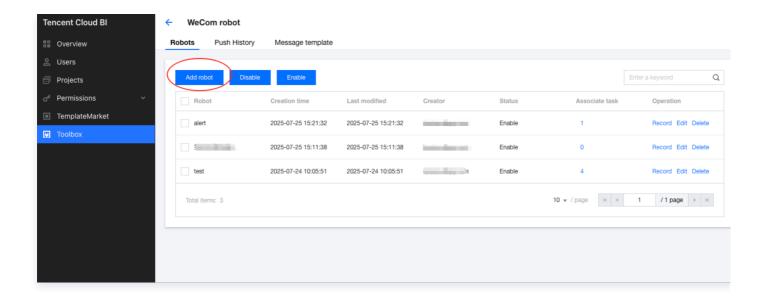
1. Go to the Business Intelligence (BI) console > Toolbox > WeCom Robot.



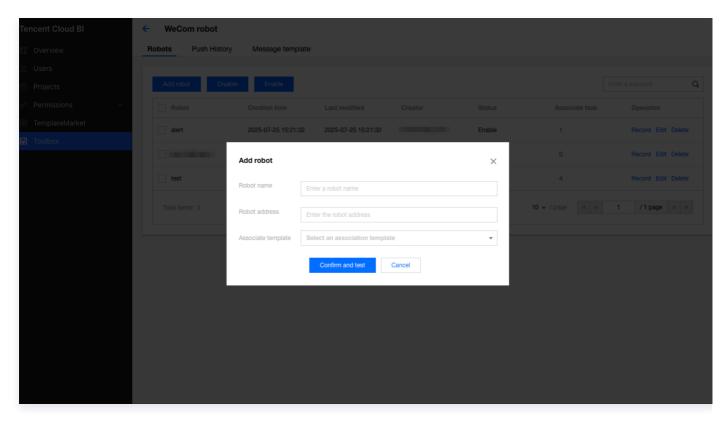


2. Add the robot.





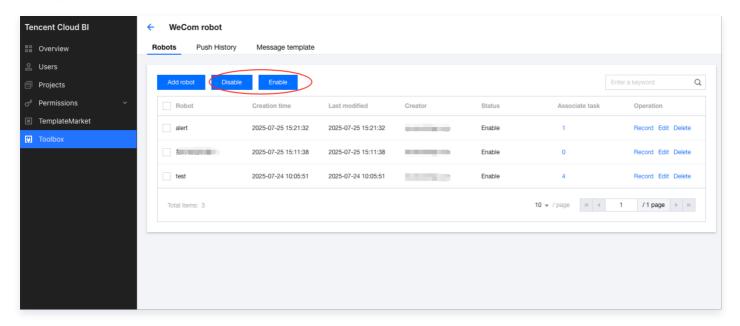
Associate a template with the robot (the template determines the push content) and enter the robot URL obtained earlier.





#### **Enabling or Disabling the WeCom Robot**

Users can enable or disable the robot as needed. When the robot is disabled, the robot will not send any messages.

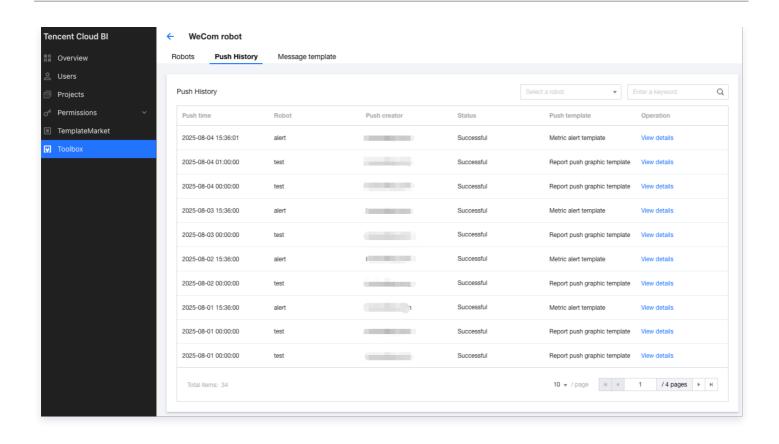


#### Viewing Push Records

Go to Push Records to view the results of all robot pushes. Users can filter the records by keywords, including robot name and template name.

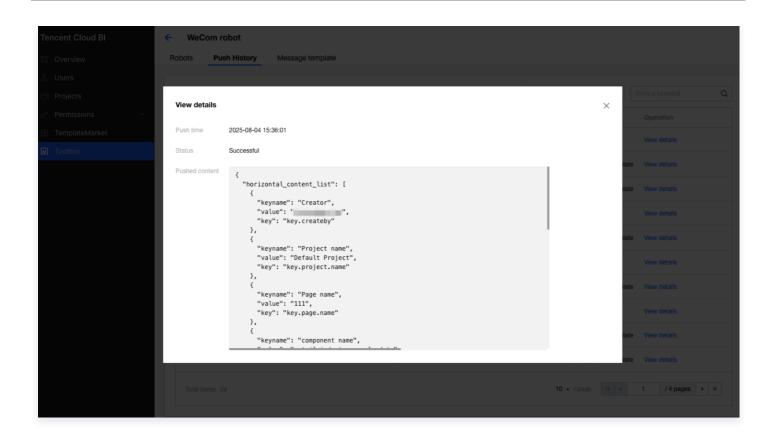
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Click View details to check the content sent this time (including the template content).







#### DingTalk Robot Management

Last updated: 2025-09-19 15:24:43

When the user's working environment is DingTalk, the user can easily subscribe to report push notifications through the DingTalk Robot. To use the DingTalk Robot for push notifications, the robot information needs to be registered on the platform beforehand.

This document introduces the following operations:

- Obtaining the DingTalk Robot Webhook URL.
- Adding the DingTalk Robot in BI
- Enabling or disabling the DingTalk Robot
- Viewing push records

#### Obtaining the DingTalk Robot Webhook URL

- 1. Prerequisite: The DingTalk administrator needs to first register and log in to the DingTalk Open Platform. For detailed instructions, refer to the relevant documentation on the DingTalk Open Platform.
- 2. Log in to the DingTalk Open Platform > App Development > DingTalk Apps (Internal Enterprise Apps) > Create App.
- 3. Enter the required app information, save the information, and proceed to the next step.
- 4. Select the app capability type as "Robot".
- 5. Complete the information in the robot configurations.
- 6. Publish the robot.
- 7. Create a group in DingTalk and add the robot to the group.

In the group settings, select Robot.

Add the robot.

Select the internal enterprise app robot created earlier.

8. Obtain the robot URL.

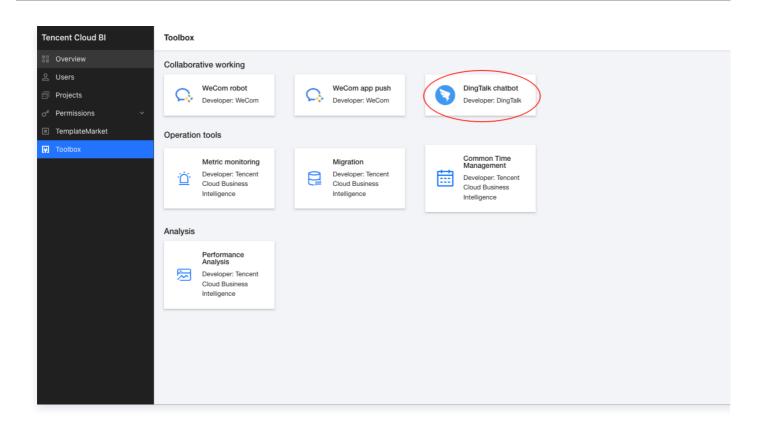
In the group, open the robot's profile card to access the robot's homepage.

Copy the webhook URL.

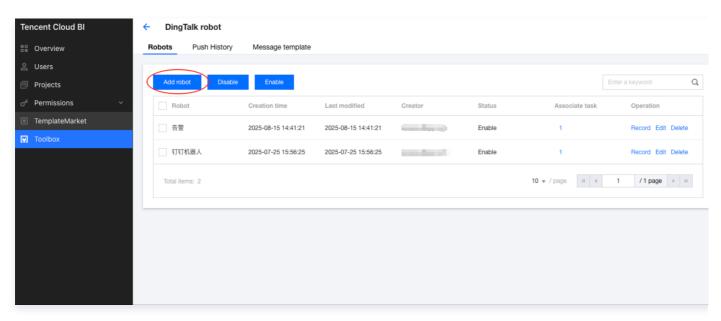
#### Adding the DingTalk Robot in BI

1. Go to the Business Intelligence (BI) console > Toolbox > DingTalk Robot.



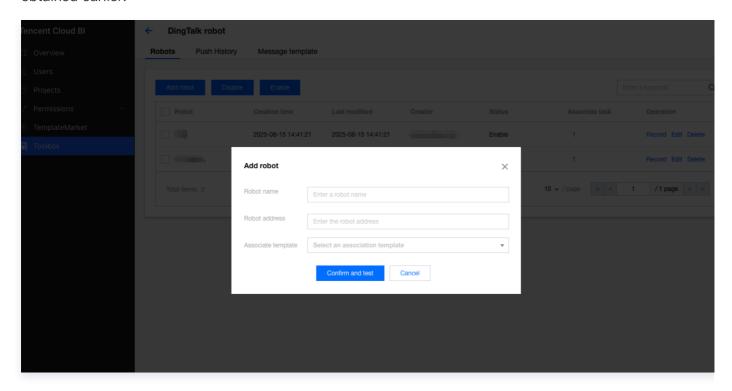


#### 2. Add the robot.





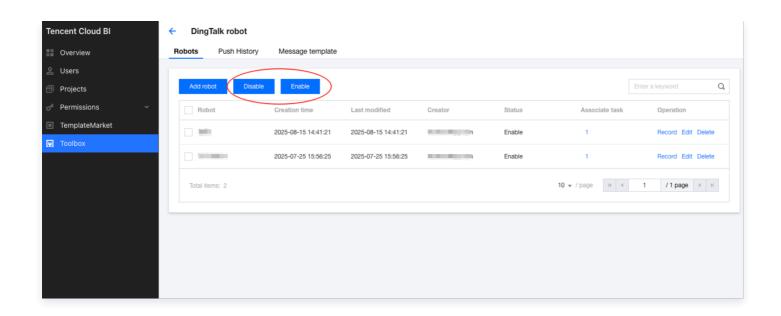
Associate a template with the robot (the template determines the push content) and enter the robot URL obtained earlier.



#### **Enabling or Disabling the DingTalk Robot**

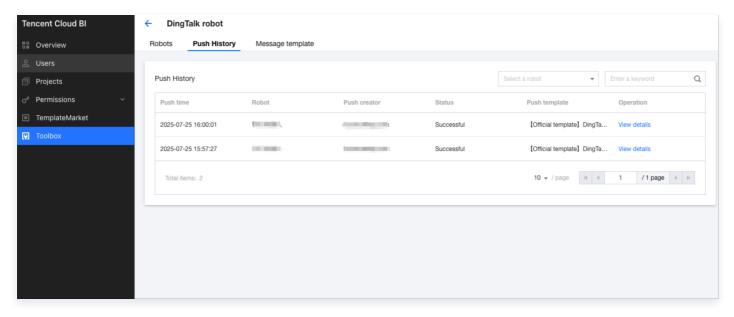
Users can enable or disable the robot as needed. When the robot is disabled, the robot will not send any messages.





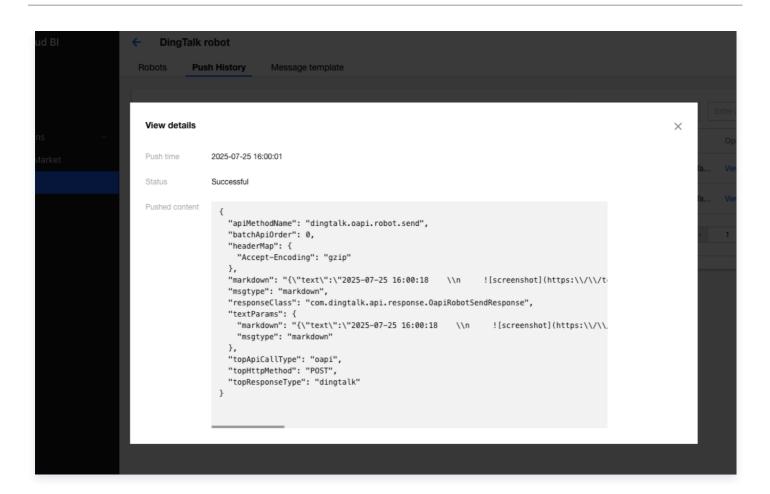
#### Viewing Push Records

Go to Push Records to view the results of all DingTalk Robot pushes. Users can filter the records by keywords, including robot name and template name.



Click View Content to check the content sent this time (including the template content).







### Report Push WeCom/DingTalk Robot Push

Last updated: 2025-09-19 15:24:44

#### ! Note:

- Robot messages are pushed using a broadcast-subscription model. Any group that has subscribed to the robot will receive the push messages. For data security purposes, consider limiting the group access permissions for adding the robot if needed.
- 2. To push messages to the targeted WeCom users, use the WeCom App Push method.
- 3. If the push task fails consecutively 3 times (for example, if the task is scheduled for 10 o'clock daily, and the push task fails 3 days in a row), the system will automatically stop the task.

  The user can restart the task by editing or enabling the task again.

Once the report is generated, you can customize the push schedule as needed and receive the reports on a regular basis through a webhook-enabled robot.

Prerequisite: Add the corresponding robot first via WeCom Robot Management or DingTalk Robot Management.

This document introduces the following operations:

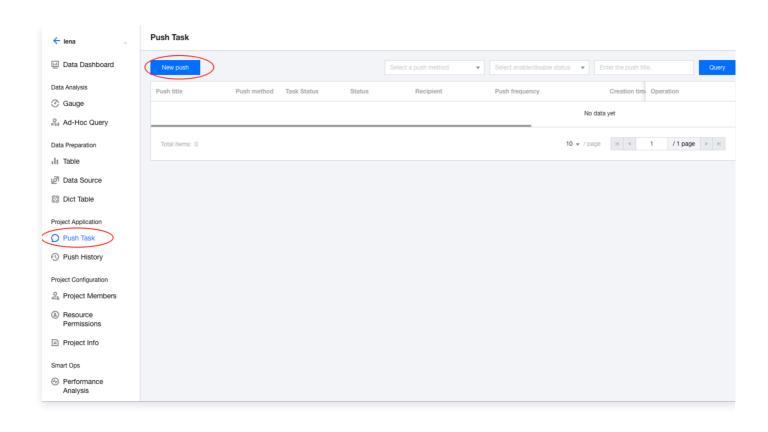
- Robot push configurations.
- Push tests.
- Manual push.
- Viewing push records.
- Enabling or disabling a task.

#### **Robot Push Configuration**

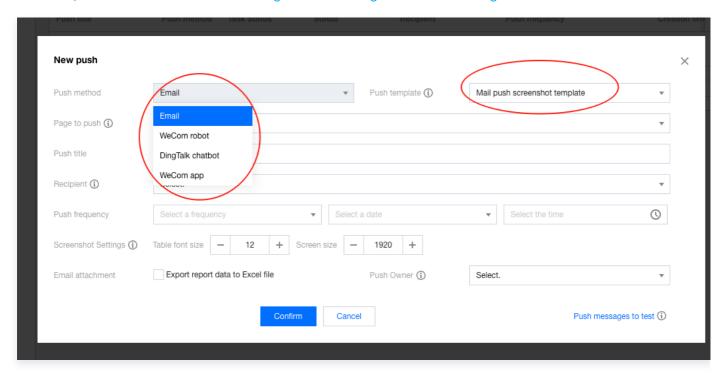
The configurations for the WeCom Robot and DingTalk Robot are the same. The configuration method is illustrated below using the WeCom Robot as an example.

1. Go to the project management section > select a project > Push Tasks > New Push.





2. Select WeCom Robot as the push method, and choose which robot to use for the push. If no robot is available, refer to WeCom Robot Management or DingTalk Robot Management to add one.





#### 3. Other push configurations.

Configuration Item	Configuration Description	Remarks
Push page	Select the page element to be pushed.	The page needs to be published before the push so that the page can be accessed.
Push frequency	Set the frequency for scheduled push tasks.	-
Notification robot	For testing and receiving alarm notifications. You can enter the group robot URL manually (to prevent misoperations, robot selection is disabled, and only manual entry is allowed).	It is recommended not to use the same address as the official push robot.
Content	Include the beginning, the ending, and the link for sharing.	If the push page has not enabled report sharing, you need to enable the sharing first.
Advanced settin gs – start time	Select the date for the first push execution.	For example, the first push will start next Monday with the current settings.
Advanced settin gs – exception control – empty monitoring	Set the handling method for empty charts, including the following configuration items.  1. Empty range: Include fully empty and partially empty charts.  2. Handling of empty values: You can choose to pause the current push (unselecting will ignore the empty values and proceed with the push) or send an alarm (selecting this option will send an alarm to the notification robot when empty values are detected).	You can choose to send an alarm and pause the push at the same time.
Advanced settin gs – exception control – access exception monitoring	Set the handling method for chart access errors, including the following configuration items.  1. Exception range: Include fully erroneous charts and partially erroneous charts.	You can choose to send an alarm and pause the push at the same time.

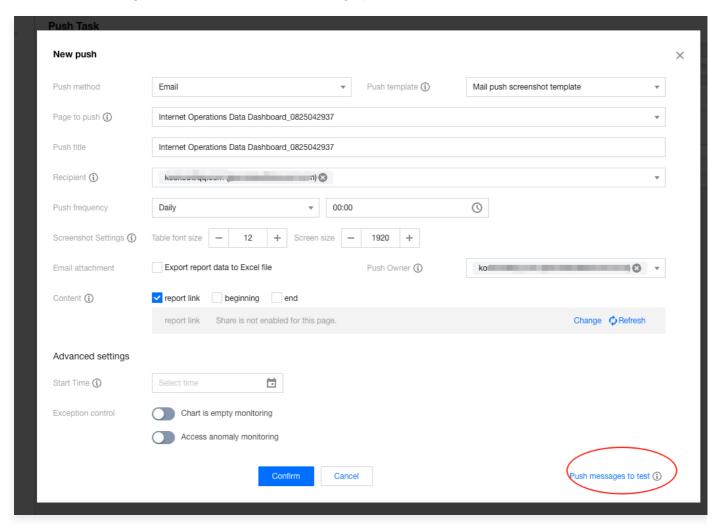


2. Handling of exceptions: You can choose to pause the current push (unselecting will ignore the exceptions and proceed with the push) or send an alarm (selecting this option will send an alarm to the notification robot when empty values are detected).

#### **Push Tests**

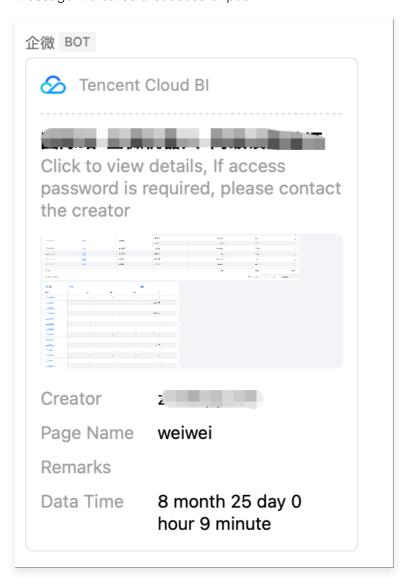
Before the official push, it is necessary to perform a push test to verify whether the content is correct. Before running a push test, you need to enter the robot URL for receiving test messages. It is recommended not to use the same robot as in the official push to avoid disturbing the official push recipients.

1. Click Push messages to test to initiate the message push.





2. Ensure that the message has been received. Taking WeCom as an example, receiving the following message indicates a successful push!

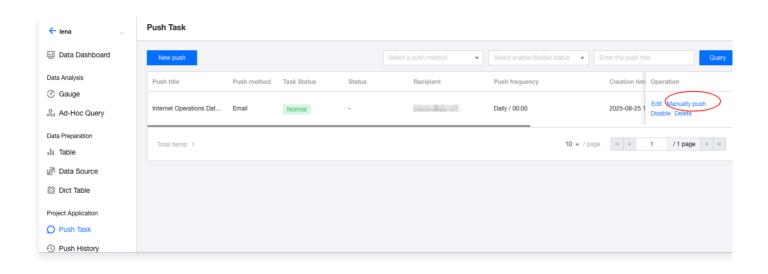


#### Manual Push

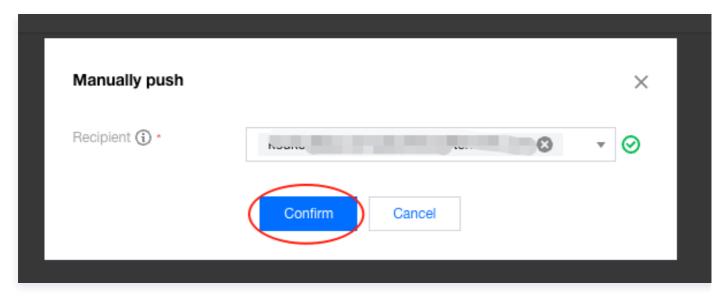
Certain scenarios may cause the push to be paused (for example, access exceptions causing the push to halt). In such cases, users can perform a manual push.

1. In the list, selecting Manual Push will trigger a push with the same content and recipients as the scheduled push.





2. In the secondary confirmation pop-up window, click **Confirm** to start the push.



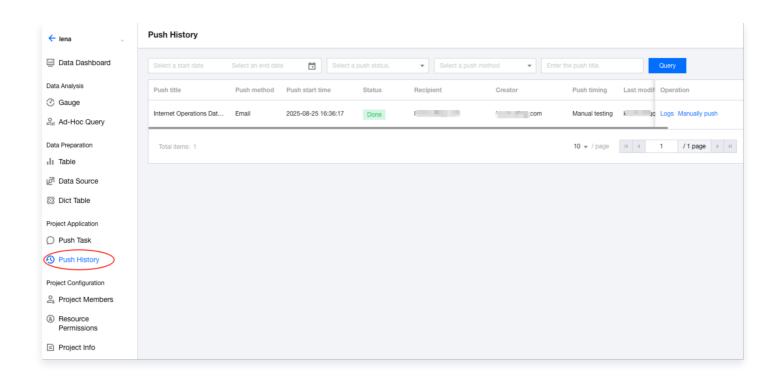
#### ⚠ Note:

Manual push will send the message immediately, bypassing the scheduled time in the task. Confirm that you want to send the message instantly before performing the manual push.

#### Viewing Push Records

Users can view the push details for the current project in Push Records.





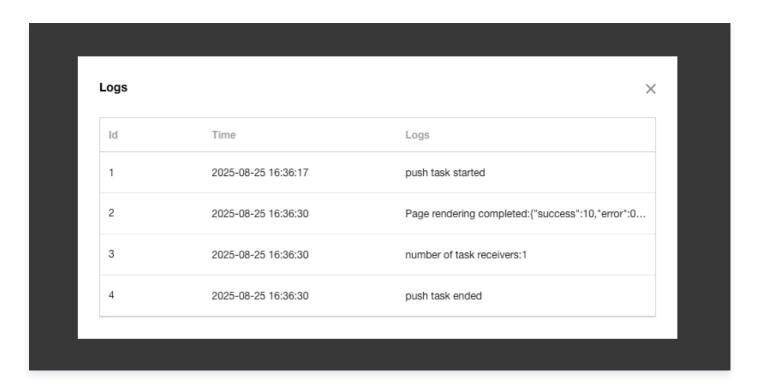
Click View Content to check the content of this push.





Click Logs to view the log information for this push.



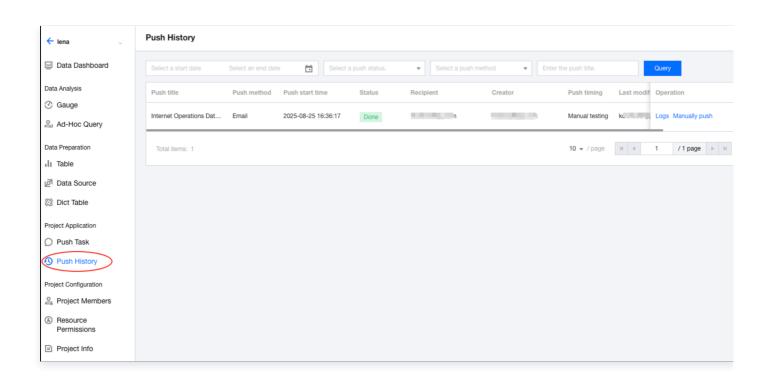


#### **Enabling or Disabling a Task**

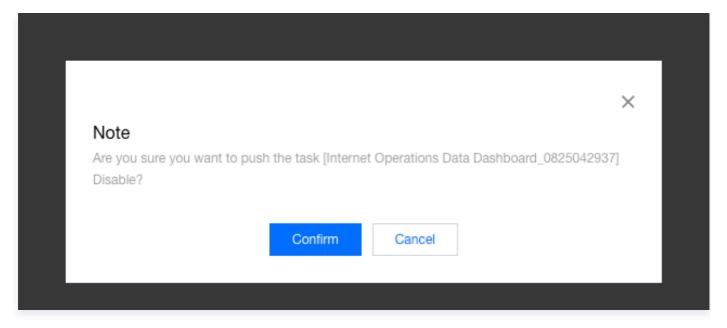
In some cases, tasks may need to be temporarily paused to stop the push. Once adjustments are made, the task needs to be enabled again to resume the push. You can manage the task flexibly through the following steps.

1. In the task list, click **Disable** to suspend an enabled task.



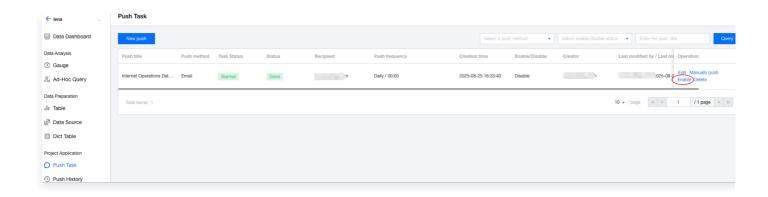


2. In the secondary confirmation pop-up layer, click Confirm to continue disabling the task.



3. In the disabled status, users can also enable the task to restore the task to the enabled status.







#### WeCom App Push

Last updated: 2025-09-19 15:24:44



#### Note:

If the push task fails consecutively 3 times (for example, if the task is scheduled for 10 o'clock daily, and the push task fails 3 days in a row), the system will automatically stop the task. The user can restart the task by editing or enabling the task again.

Once the report is generated, you can customize the push schedule as needed and send the message to targeted WeCom users via WeCom app notifications.

Prerequisite: Complete the WeCom App Authorization first.

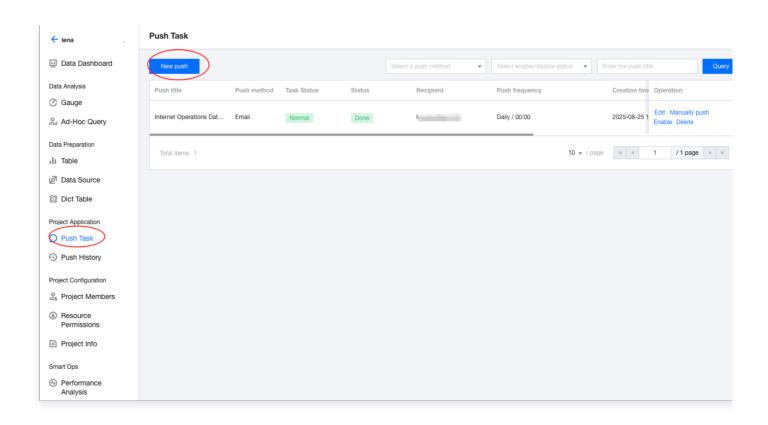
This document introduces the following operations:

- WeCom app push configurations
- Push tests.
- Manual push.
- Viewing push records.
- Enabling or disabling a task.

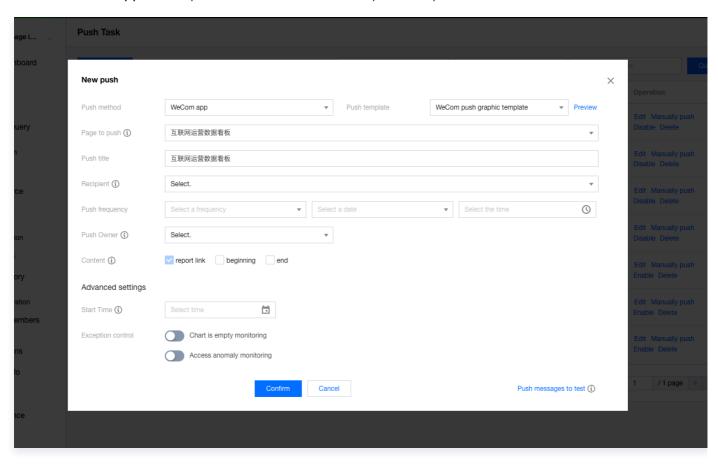
#### **WeCom App Push Configuration**

1. Go to the project management section > select a project > Push Task > New Push.





2. Select **WeCom app** as the push method and choose a push template.





#### 3. Other push configurations.

Configuration Item	Configuration Description	Remarks
Push page	Select the page element to be pushed.	The page needs to be published before the push so that the page can be accessed.
Push frequency	Set the frequency for scheduled push tasks.	_
Push owner	For testing and receiving alarm notifications.	_
Content	Include the beginning, the ending, and the link for sharing.	If the push page has not enabled report sharing, you need to enable the sharing first.
Advanced settin gs – start time	Select the date for the first push execution.	For example, the first push will start next Monday with the current settings.
Advanced settin gs – exception control – empty monitoring	Set the handling method for empty charts, including the following configuration items.  1. Empty range: Include fully empty and partially empty charts.  2. Handling of empty values: You can choose to pause the current push (unselecting will ignore the empty values and proceed with the push) or send an alarm (selecting this option will send an alarm to the notification robot when empty values are detected).	You can choose to send an alarm and pause the push at the same time.
Advanced settin gs – exception control – access exception monitoring	Set the handling method for chart access errors, including the following configuration items.  1. Exception range: Include fully erroneous charts and partially erroneous charts.  2. Handling of exceptions: You can choose to pause the	You can choose to send an alarm and pause the push at the same time.

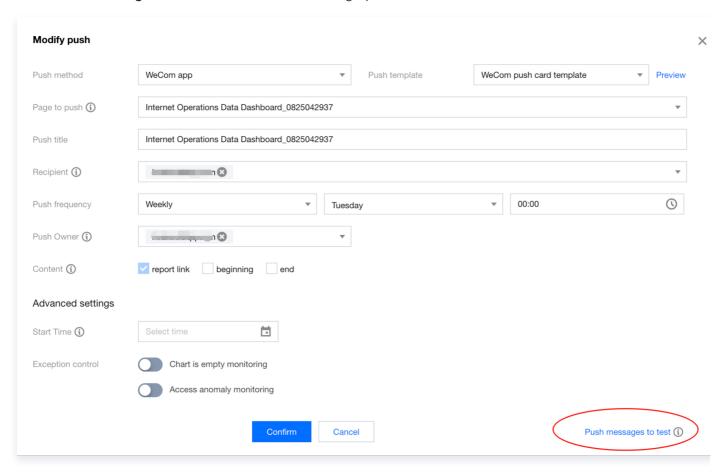


current push (unselecting will ignore the exceptions and proceed with the push) or send an alarm (selecting this option will send an alarm to the notification robot when empty values are detected).

## **Push Tests**

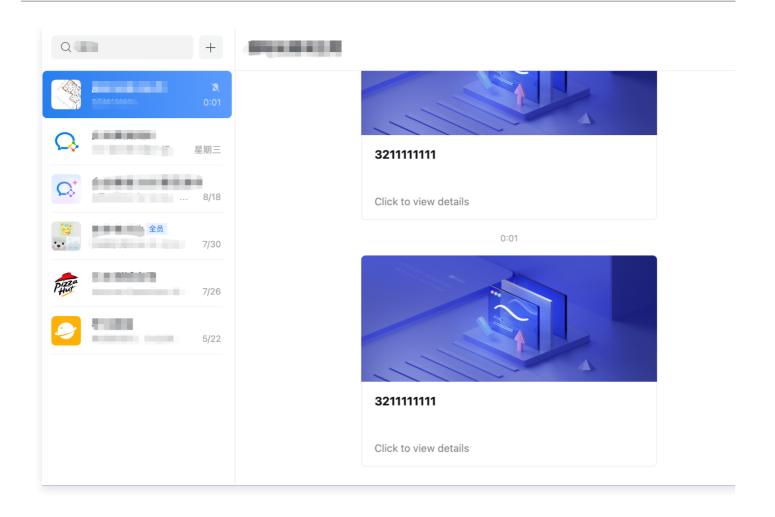
Before the official push, it is necessary to perform a push test to verify whether the content is correct.

1. Click **Push messages to test** to initiate the message push.



2. The push is successful once the application message is received in WeCom.

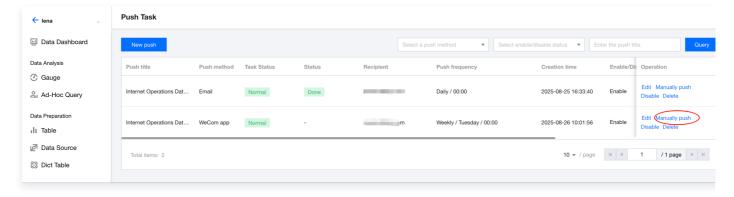




## Manual Push

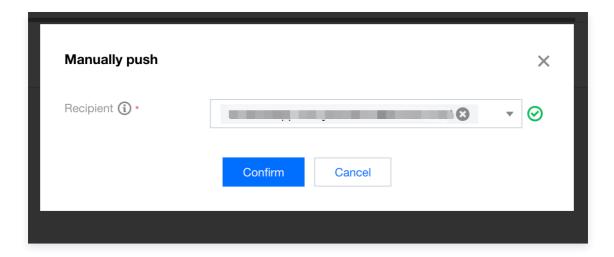
Certain scenarios may cause the push to be paused (for example, access exceptions causing the push to halt). In such cases, users can perform a manual push.

1. In the list, selecting Manual Push will trigger a push with the same content and recipients as the scheduled push.



2. In the secondary confirmation pop-up window, click Confirm to start the push.



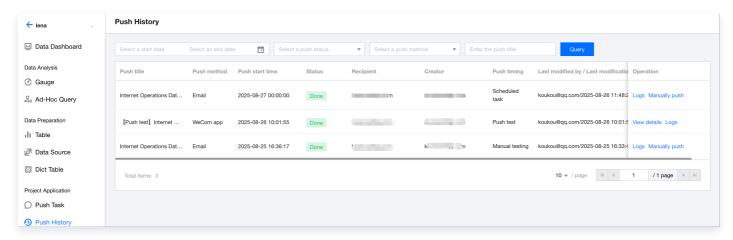


**⚠** Note:

Manual push will send the message immediately, bypassing the scheduled time in the task. Confirm that you want to send the message instantly before performing the manual push.

## Viewing Push Records

Users can view the push details for the current project in Push Records.



Click View details to check the content of this push.



```
View details
                                                                                                                         \times
Push time
               2025-08-26 10:01:55
Status
               Successful
Pushed content
                  "msgtype": "news",
                  "news": {
                     "articles": [
                         "title": "[Push test] Internet Operations Data Dashboard_0825042937",
                        "description": "\n\nClick to view details",
                         "url": "https://open.weixin.qq.com/connect/oauth2/authorize?appid=ww0898f360a
                        "picurl": "https://tcbi-1258344699.cos.ap-guangzhou.myqcloud.com/open/tcbi/sta
                        "key": "key.showdetails"
                    ]
                  }
```

Click Logs to view the log information for this push.

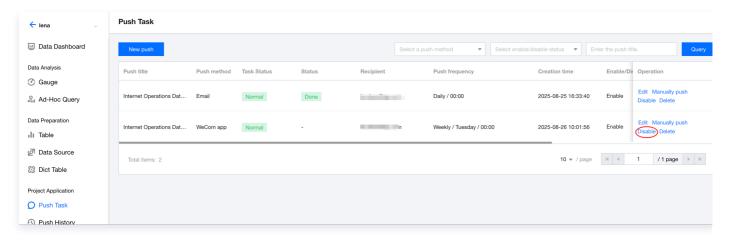
.ogs		>
Id	Time	Logs
1	2025-08-26 10:01:55	push task started
2	2025-08-26 10:02:07	Page rendering completed:{"success":10,"error":0
3	2025-08-26 10:02:07	number of task receivers:1
4	2025-08-26 10:02:08	push task ended

# **Enabling or Disabling a Task**

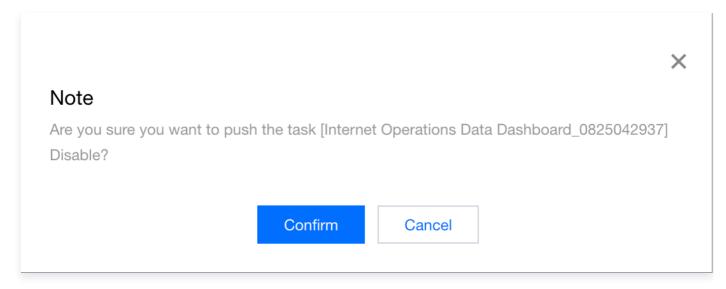


In some cases, tasks may need to be temporarily paused to stop the push. Once adjustments are made, the task needs to be enabled again to resume the push. You can manage the task flexibly through the following steps.

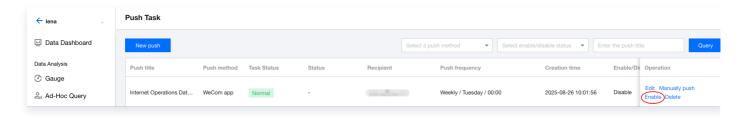
1. In the task list, click **Disable** to suspend an enabled task.



2. In the secondary confirmation pop-up layer, click Confirm to continue disabling the task.



3. In the disabled status, users can also enable the task to restore the task to the enabled status.





## **Email Push**

Last updated: 2025-09-19 15:24:44

#### Note:

- 1. Email notifications cannot be received if the sender or person in charge is deleted or the email address is unbound.
- 2. If the push task fails consecutively 3 times (for example, if the task is scheduled for 10 o'clock daily, and the push task fails 3 days in a row), the system will automatically stop the task. The user can restart the task by editing or enabling the task again.

Once the report is generated, you can customize the push schedule as needed to receive regular reports via email.

#### Prerequisites:

- The page to be pushed has been published.
- The email address is deliverable and will not block emails.

This document introduces the following operations:

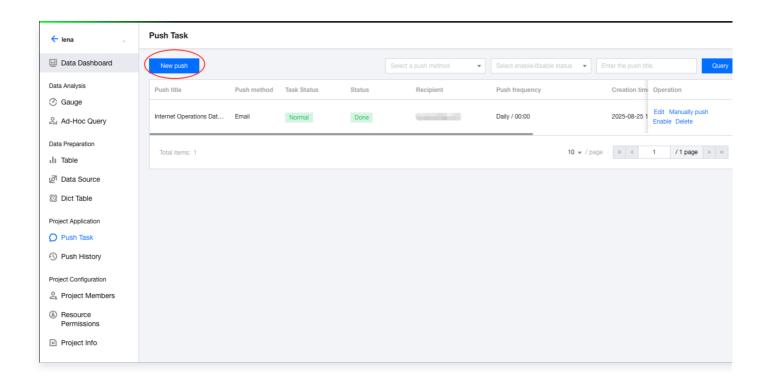
- Email push configurations.
- Push tests.
- Manual push.
- Viewing push records.
- Enabling or disabling a task.

## **Email Push Configuration**

The configurations for the WeCom Robot and DingTalk Robot are the same. The configuration method is illustrated below using the WeCom Robot as an example.

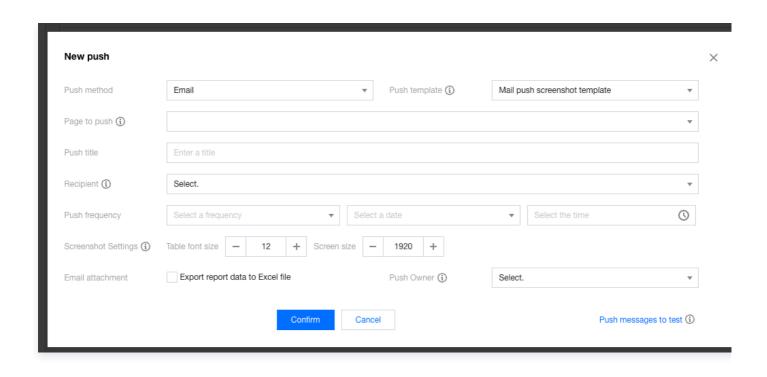
1. Go to the project management section > select a project > Push Tasks > New push.





2. Select Email as the push method and choose the email template to be used for the push.





Business Intelligence (BI) includes built-in screenshot templates and HTML templates to better adapt to email reading. The differences are:

- O Screenshot templates: The email will only display images. If the page contains table components with a large volume of data, only the data visible on 1 screen will be included.
- O HTML templates: The email will display as an HTML page. If the page contains table components, they will be displayed as tables with a maximum of 500 rows, rather than as images.

#### Mote:

Due to different HTML rendering behaviors in email readers (for example, Hotmail), display issues may occur, including misaligned rows and clipped content (for example, the email displays correctly in the WeCom email but incorrectly in Gmail). If you plan to use the HTML template, conduct thorough testing to ensure that the content is displayed as fully as possible on the client applications used by employees.

3. Select email recipients: If a user is not selectable from the list, it means that the user cannot receive email push notifications (for example, if the user is disabled).

#### Mote:

If a user is deleted in the user management module and later added again, even if the username and email remain the same, the recipient will show as "User does not exist" here. You will need



to select the user again (a user added after deletion is considered a brand-new user).

## 4. Other push configurations.

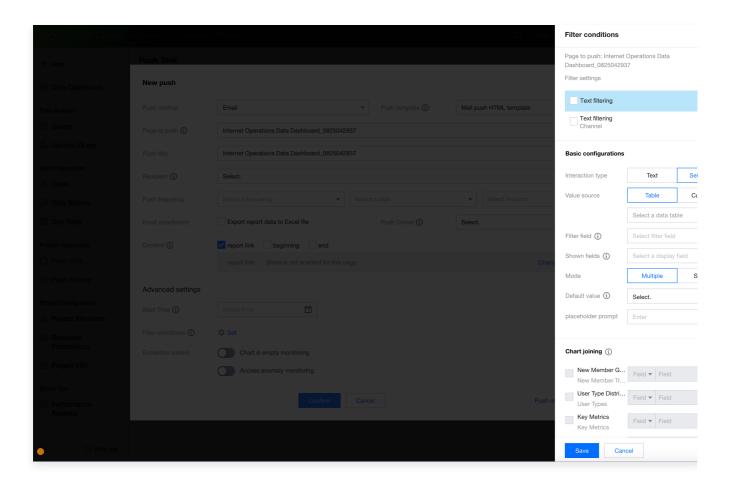
Configuration Item	Configuration Description	Remarks
Push page	Select the page element to be pushed.	The page needs to be published before the push so that the page can be accessed.
Push frequency	Set the frequency for scheduled push tasks, supporting monthly, daily, or weekly intervals.	
Push owner	For testing and receiving alarm notifications.	
Content	Include the beginning, the ending, and the link for sharing.	If the push page has not enabled report sharing, you need to enable the sharing first.
Screenshot settings (only available under the email push screenshot templates)	You can set the font size for tables and the page width when pushing a report screenshot to ensure clarity.	Setting a font size that is too large or too small may affect the screenshot quality. Conduct thorough testing before applying the settings.
Email attachment	By selecting this option, you can export the Excel data of the current pushed page as an attachment.	
Advanced settings – start time	Select the date for the first push execution.	The first push time is the first occurrence of the push frequency after the selected start time. For example, if the start time is next Monday and the frequency is every Friday, the actual first push time will be next Friday. If the start time is next Friday and the frequency is every Monday, the first push time will be the Monday of the week after next.



Advanced settings – exception control – empty monitoring	Set the handling method for empty charts, including the following configuration items.  1. Empty range: Include fully empty and partially empty charts.  2. Handling of empty values: You can choose to pause the current push (unselecting will ignore the empty values and proceed with the push) or send an alarm (selecting this option will send an alarm to the notification robot when empty values are detected).	You can choose to send an alarm and pause the push at the same time.
Advanced settings – exception control – access exception monitoring	Set the handling method for chart access errors, including the following configuration items.  1. Exception range: Include fully erroneous charts and partially erroneous charts.  2. Handling of exceptions: You can choose to pause the current push (unselecting will ignore the exceptions and proceed with the push) or send an alarm (selecting this option will send an alarm to the notification robot when empty values are detected).	You can choose to send an alarm and pause the push at the same time.
Condition settings (Only available under the HTML email templates)	If filters are present on the current page, you can set default filter values before the push to filter the data. The operation works the same as applying the filter.	

Example of condition settings:



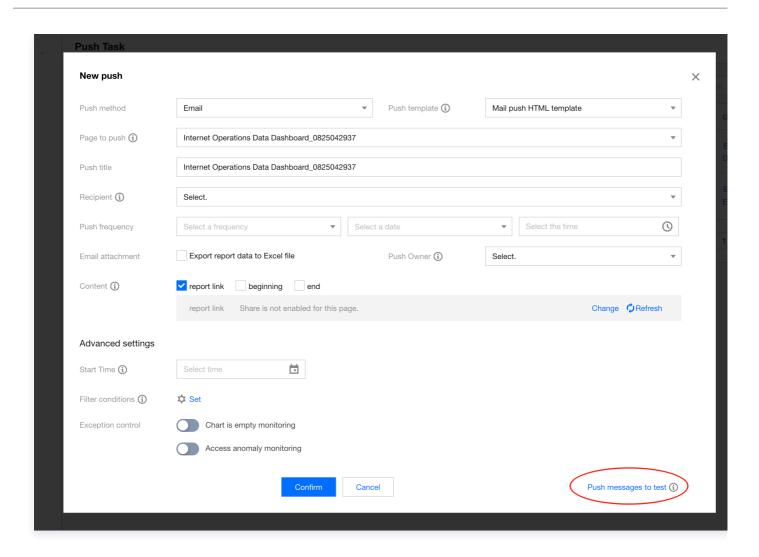


## **Push Tests**

Before the official push, it is necessary to perform a push test to verify whether the content is correct. Before the push test, select the push owner to receive the test email.

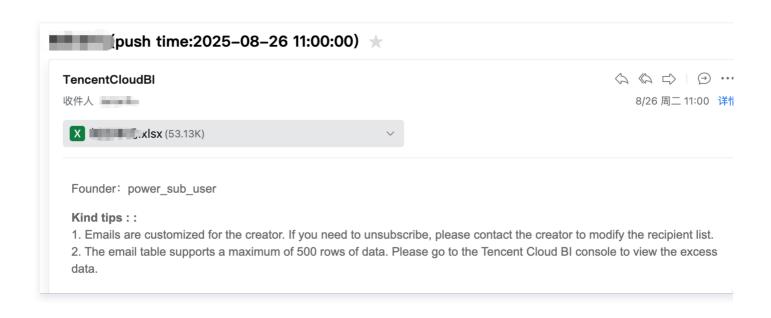
1. Click Push Test to initiate the message push.





2. Ensure that the message is received: If you receive the following message, the push has been successful!

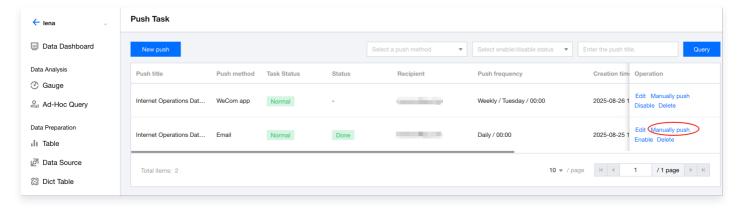




## Manual Push

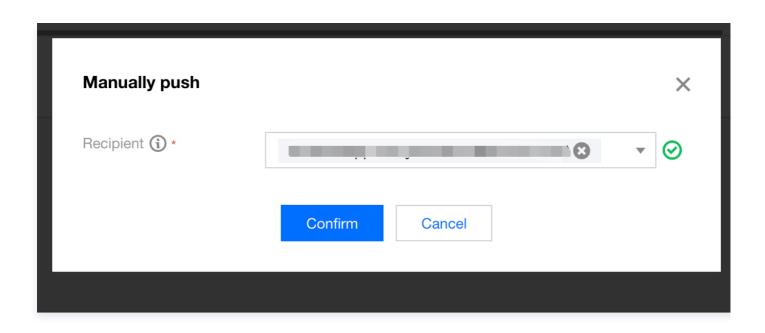
Certain scenarios may cause the push to be paused (for example, access exceptions causing the push to halt). In such cases, users can perform a manual push.

1. In the list, selecting Manual Push will trigger a push with the same content and recipients as the scheduled push.



2. In the secondary confirmation pop-up window, click Confirm to start the push.



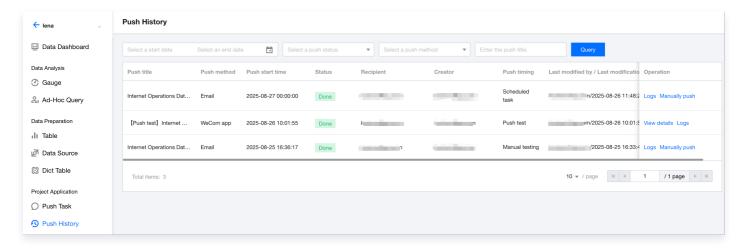


#### ⚠ Note:

Manual push will send the message immediately, bypassing the scheduled time in the task. Confirm that you want to send the message instantly before performing the manual push.

## Viewing Push Records

Users can view the push details for the current project in Push Records.



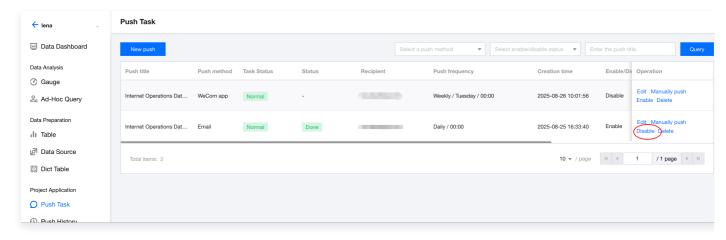
Click **Logs** to view the log information for this push.



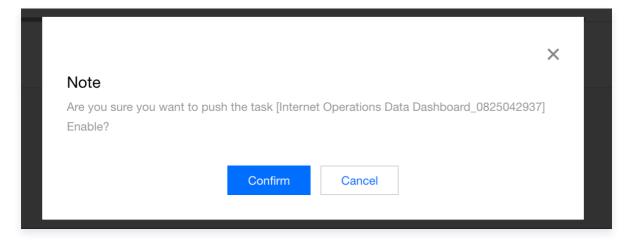
## **Enabling or Disabling a Task**

In some cases, tasks may need to be temporarily paused to stop the push. Once adjustments are made, the task needs to be enabled again to resume the push. You can manage the task flexibly through the following steps.

1. In the task list, click **Disable** to suspend an enabled task.

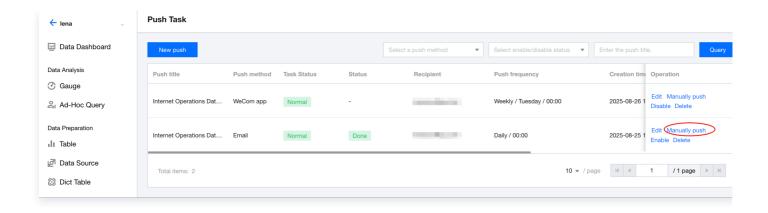


2. In the secondary confirmation pop-up layer, click Confirm to continue disabling the task.



3. In the disabled status, users can also enable the task to restore the task to the enabled status.







# Sharing

Last updated: 2025-09-19 15:24:44

After the report is created, you can share the report with others for viewing as needed.

#### Prerequisites:

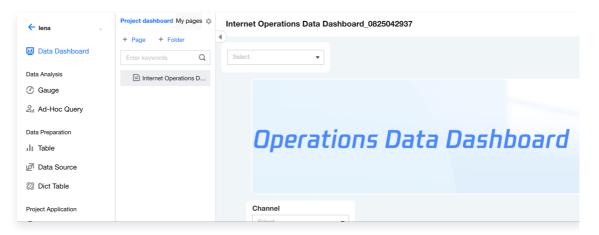
- The shared page has been published.
- The user initiating the share needs to have the "Share" permission.
- To include page parameters, you need to purchase the Professional Edition.

In this document, you will learn:

- How to set up a share page;
- How to include page parameters to a shared page.

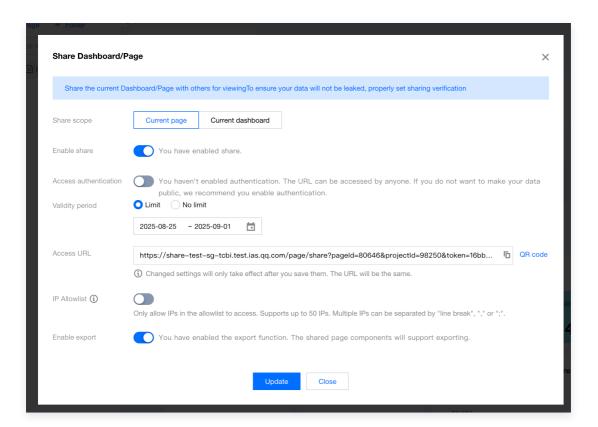
## Page Sharing Settings

1. Go to the project > Dashboard > click the Share icon.



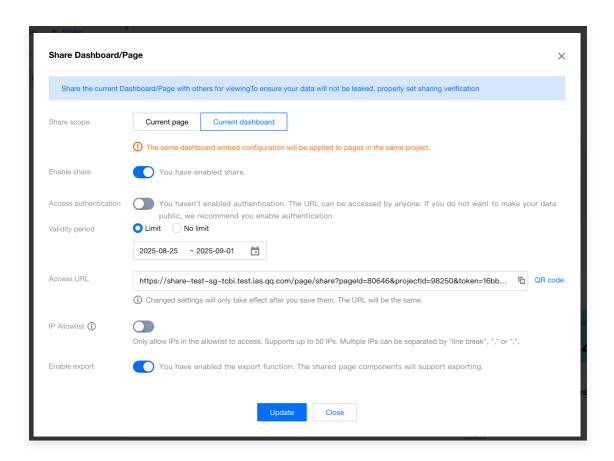
2. In the pop-up layer, you can share the current page.





- Enable sharing: The current page will be shared. Otherwise, users will encounter an error when accessing the old link.
- Access verification: If verification is disabled, any user with the current access link can view the page (it is recommended to enable verification). Otherwise, users will need a password to access the page.
- Validity period: You can set no time limit. Once a time limit is set, users will only be able to access the page within the specified validity period.
- O Access link: Copy the link and distribute the link to viewers.
- 3. At the same time, sharing the entire project's dashboard is supported (requires the project administrator or enterprise administrator roles):





#### Mote

- 1. The current page sharing requires the initiator to have edit permission for the webpage, otherwise unable to initiate sharing;
- 2. The project dashboard sharing can only be initiated by project administrators or enterprise administrators.
- 3. Users access pages through the access link. The system does not validate the viewer identity. For data security consideration, please be cautious when sharing.
- 4. After sharing is enabled, the link is generated automatically. Any updates to the sharing configurations require clicking 'Update Settings' to take effect.

## **Sharing Page with Parameters**

1. After the sharing settings are configured as above, the shared access link is obtained.

```
/* In this example, assume the access link obtained is as follows.
Remember to modify the values for pageId, projectId, and token. */
https://tcbi.qq.com/page/share?
pageId=111&projectId=222&token=337858f3-0366-4845-991e-
```



## f51c6de63b9f&scope=page&canvasType=GRID

2. Construct the URL page parameters.

Refer to URL Page Parameter Construction to obtain the page parameters required to be included. In this example, we assume the "department" parameter with the value "Quality Group" needs to be included.

params[]=value=quality\_group%26target%3Ddepartment

3. Append the constructed URL parameters to the shared link.

https://tcbi.qq.com/page/share?
pageId=111&projectId=222&token=337858f3-0366-4845-991ef51c6de63b9f&scope=page&canvasType=GRID¶ms[]=value=quality\_group%26tar
get%3Ddepartment



# Embedding Dashboard Embedding

Last updated: 2025-09-19 15:24:44

The dashboard embedding feature enables users to embed pages or project dashboards into third-party systems, providing easy access for third-party users.

Prerequisites for the embedding feature:

- The current edition is the Basic Edition or the Professional Edition.
- Pages need to be published first before they can be embedded.
- The current user is an Enterprise Administrator or Project Administrator.
- To include page parameters, you need to purchase the Professional Edition.

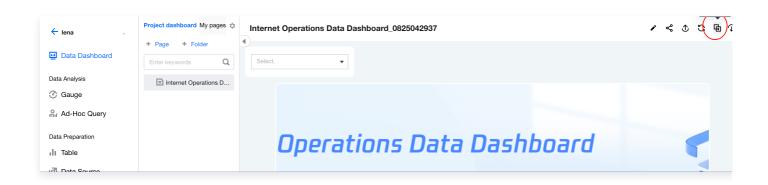
In this document, you will learn:

- How to embed the entire dashboard.
- How to set the default display page.

## **Dashboard Embedding Settings**

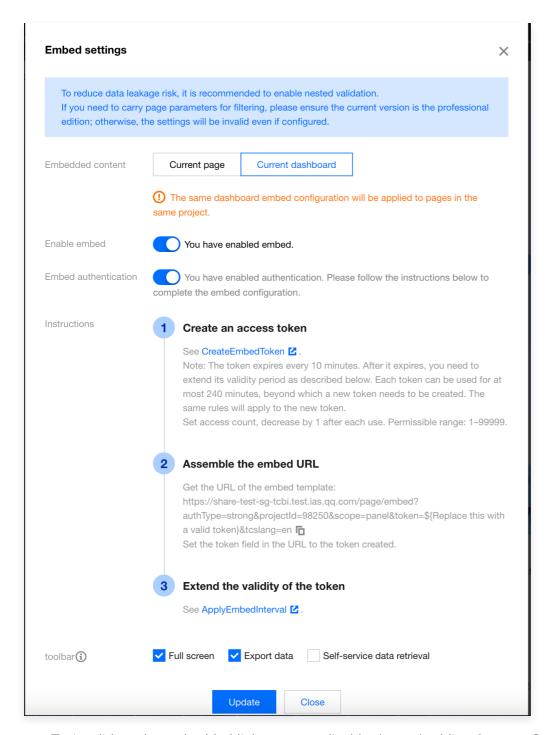
Users can complete the embedding settings through the following steps.

1. Go to the project > Dashboard, and click the Embed icon.



2. In the embedding configurations, select "Current dashboard".





- To invalidate the embedded link, you can disable the embedding feature. Once the embedding feature is disabled, users will see a "Page not accessible" message when trying to access the embedded link.
- O To enable authentication access for the embedded page, you can enable embedding verification. After the verification is enabled, users will need to use a token to gain the corresponding permissions. For details, see Creating an Embedded Report Token and The API for Requesting Token Expiry Time Extension.
- If embedding verification is not enabled, the embedded link may be exposed. It is recommended to enable embedding verification for non-public data to ensure security.



 If you want the link to be accessible only within a specific validity period, you can set the validity period. Once the validity period is enabled, users attempting to access the link outside the validity period will see a "Out of validity range" error.

#### Mote:

The embedding of the project dashboard applies to the entire dashboard, meaning that any page's settings for the project dashboard will be synchronized. If someone else disables the embedding of the project dashboard on any page within the project, the previous settings will be overwritten.

3. Click **Update Settings** for the settings to take effect.

## Setting the Default Display Page for the Dashboard

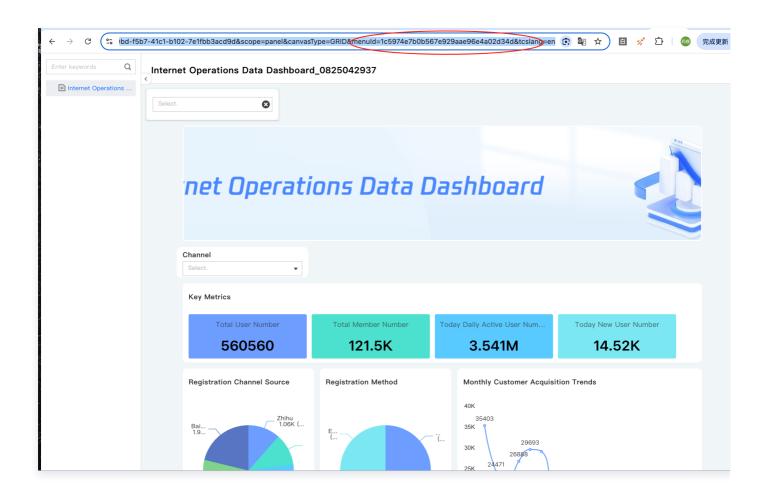
In the embedded dashboard, if you need to set a default page to open upon entry, you can specify the default page using the menuld.

1. Obtain the embedded dashboard link: Follow the configuration steps above to embed the dashboard.

```
/* In this example, assume the embedded link is obtained as shown
below. Remember to modify the projectId, menuId and token values. */
  https://tcbi.qq.com/page/embed?
authType=weak&menuId=1234455&projectId=111&scope=panel&token=1165dd48-
be27-4cbd-97be-e5b5cf5bae25&canvasType=GRID
```

2. Obtain the menuld: Browse the dashboard, click the page, and obtain the menuld from the URL, as shown in the image below.





3. Modify the embedded link: Replace the original menuld with the obtained menuld.

https://tcbi.qq.com/page/embed?
authType=weak&menuId=6a143c9bc1bb1ac190e280f4210c0a07&projectId=111&sc
ope=panel&token=1165dd48-be27-4cbd-97be-e5b5cf5bae25&canvasType=GRID



# Page Embedding

Last updated: 2025-09-19 15:24:44

The page embedding feature enables users to embed pages into third-party systems, providing easy access for third-party users.

Prerequisites for the embedding feature:

- The current edition is the Basic Edition or the Professional Edition.
- Pages need to be published first before they can be embedded.
- The current user is an Enterprise Administrator or Project Administrator.
- To include page parameters, you need to purchase the Professional Edition.

In this document, you will learn:

- How to embed a single page.
- How to add page parameters to a page.

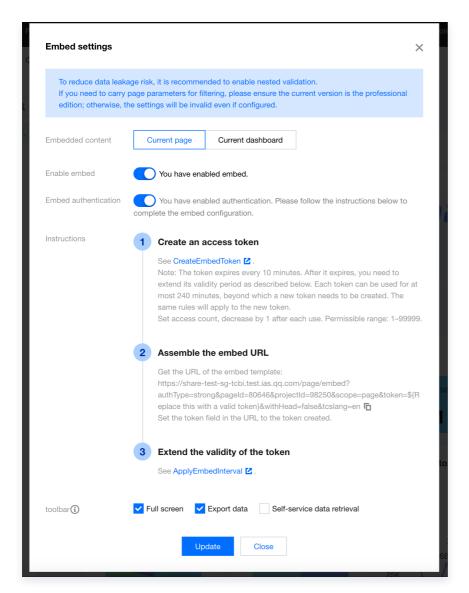
## Page Embedding Settings

- 1. Go to the project > Dashboard.
- 2. Click the Embed icon.



3. In the embedding configurations, select "Current page".





- To invalidate the embedded link, you can disable the embedding feature. Once the embedding feature is disabled, users will see a "Page not accessible" message when trying to access the embedded link.
- O To enable authentication access for the embedded page, you can enable embedding verification. After the verification is enabled, users will need to use a token to gain the corresponding permissions. For details, see Creating an Embedded Report Token and The API for Requesting Token Expiry Time Extension.
- If embedding verification is not enabled, the embedded link may be exposed. It is recommended to enable embedding verification for non-public data to ensure security.
- Of If you want the link to be accessible only within a specific validity period, you can set the validity period. Once the validity period is enabled, users attempting to access the link outside the validity period will see a "Out of validity range" error.
- 4. Click Update Settings for the settings to take effect.

## **Including Parameters in Embedded Pages**



If you need to include parameters in the embedded page to filter data on the page using the page parameters, you can achieve this in 2 ways.

Method 1: Pass the parameters using the "params" explicit parameter format.



Applicable scenario: The parameters being passed are public and do not require tamper-proofing, for example, a department employee list table, where visitors can modify the "department" to access data for different departments.

#### Steps:

1. As mentioned above, enable embedding in the dashboard and obtain the embedded link.

```
/* In this example, assume the embedded link is obtained as shown
below. Remember to modify the pageId, projectId, and token values. */
 https://tcbi.qq.com/page/embed?
authType=strong&pageId=222&projectId=111&scope=page&token=${use a
valid token to replace this placeholder}&withHead=false
```

2. Construct the URL page parameters.

Refer to URL Page Parameter Construction to obtain the page parameters required to be included. In this example, we assume the "department" parameter with the value "Quality Group" needs to be included.

```
params[]=value=quality_group%26target%3Ddepartment
```

3. Append the constructed URL parameters to the embedded link.

```
https://tcbi.qq.com/page/embed?
authType=strong&pageId=222&projectId=111&scope=page&token=13456&withHe
ad=false¶ms[]=value=quality_group%26target%3Ddepartment
```

#### Method 2: Pass the parameters using the token format.



Applicable scenario: The passed parameters are used for data isolation and cannot be tampered with. For example, the department revenue data, where visitors cannot modify the parameters to access data from other departments.



#### Steps:

1. As mentioned above, enable embedding in the dashboard and obtain the embedded link.

```
/* In this example, assume the embedded link is obtained as shown
below. Remember to modify the pageId, projectId, and token values. */
https://tcbi.qq.com/page/embed?
authType=strong&pageId=222&projectId=111&scope=page&token=${use a
valid token to replace this placeholder}
```

- 2. Through the Token creation API, write the parameters to be included into "GlobalParam". Refer to Creating an Embedded Report Token for details. The following example demonstrates how to perform the operation in the Tencent Cloud API Explorer.
  - On the Creating an Embedded Report Token page, click "Click to Debug" to go to the API Explorer.
  - Fill in the relevant parameters. In this example, the key parameter is "GlobalParam", and the value should be entered as follows:

```
/* state is the page parameter in the page settings */
[{
    "ParamKey": "state",
    "JoinType": "AND",
    "WhereList": [{
        "Operator": "-eq",
        "Value": [
            "frontend",
            "backend"
        ]
    }]
}
```

- O Copy the BIToken value shown in the image above, which represents the token.
- 3. Replace the token in the embedded link with the copied value.

```
https://tcbi.qq.com/page/embed?
authType=strong&pageId=222&projectId=111&scope=page&token=a9e07157-
7994-414b-a44c-ef32ffeaf6ab
```

4. Accessing the page will automatically filter the data to display entries with the state being "frontend" or "backend".



# Self-Service Data Retrieval

Last updated: 2025-09-19 15:24:44

In the past, operators often needed to constantly request the latest detailed data from data managers, who had to run SQL queries repeatedly. This scenario involved repetitive requests and large data volumes. With self-service data retrieval, users can customize the length and segmentation of the detailed data, freeing data managers from repetitive tasks.

Use case: Large volumes of detailed data need to be retrieved.

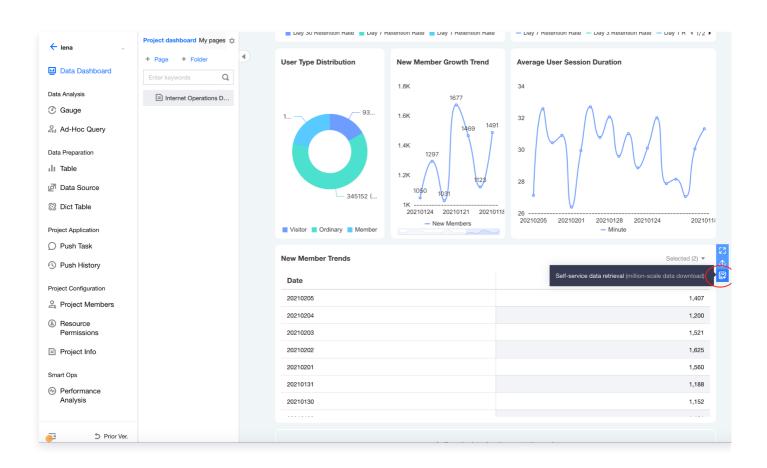
Permission limits: Enterprise administrators or project administrators.

Component support: Tables and detailed tables.

Edition feature limits: This feature is only available to Professional Edition users.

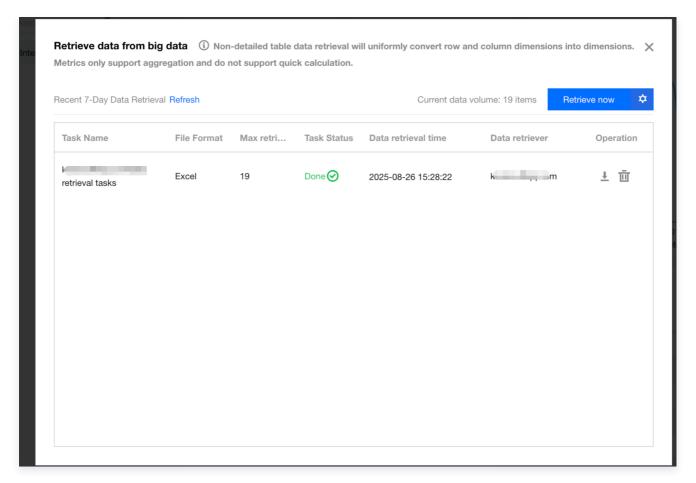
## **Operation Instructions**

1. Go to the console > Project > Dashboard, click Self-service data retrieval.



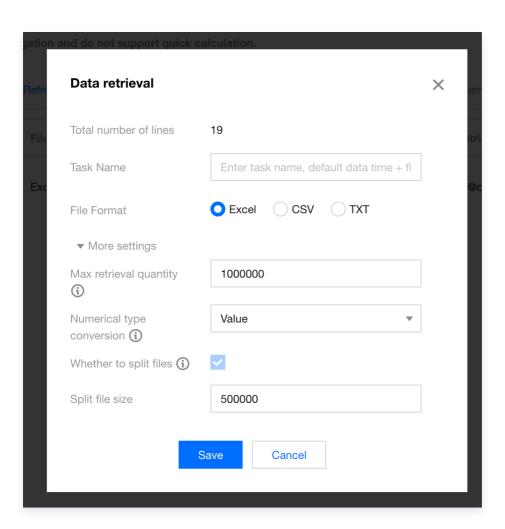


2. In the pop-up layer, you can query all data retrieval tasks from the past 7 days.

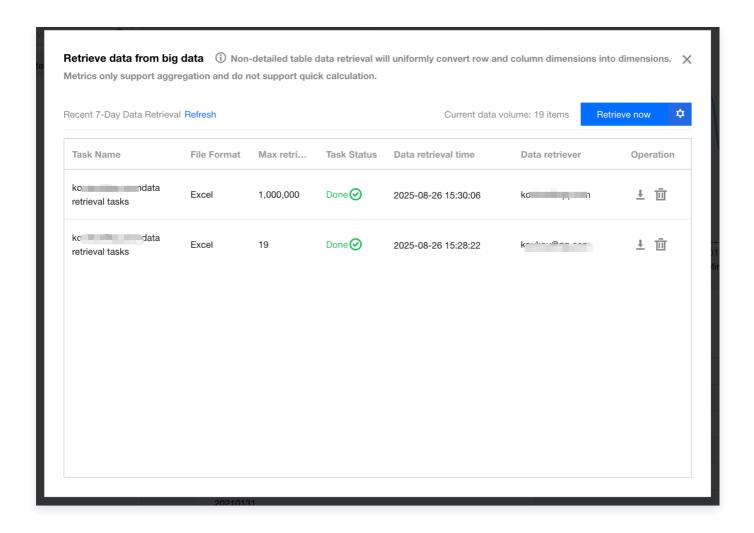


- 3. Click Retrieve Data Now to define a data retrieval task, and click Save to generate the task.
  - O Total number of rows: The total number of data rows in the table.
  - Task name: Customize the task name as needed for easy differentiation. The downloaded file will also be named according to the task name.
  - O File format: Choose one from Excel, CSV, or Text.
  - O Maximum Rows to Retrieve: The default is 1 million rows, with a maximum limit of 5 million rows.
  - O Data type conversion: Support conversion between numeric and text types.
  - Whether to split files: File splitting is supported for data retrieval. If the Excel file size exceeds 500,000 rows, the file needs to be split. Each file can support up to 500,000 rows.
  - O Split file size: Set the number of rows for each split file.



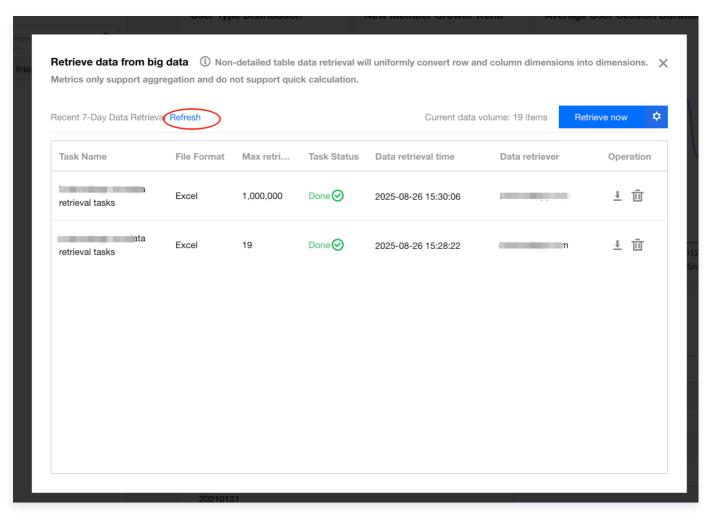






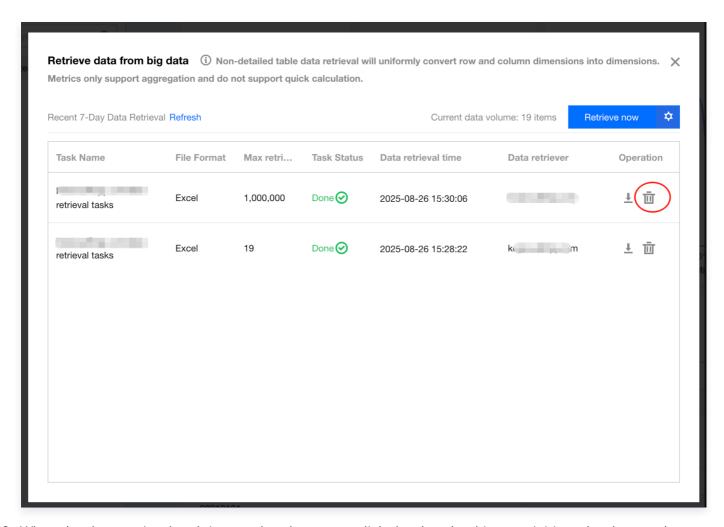
4. During data retrieval task execution, you can click **Refresh** to view the latest task status (the system will also automatically update the status when the task is completed).





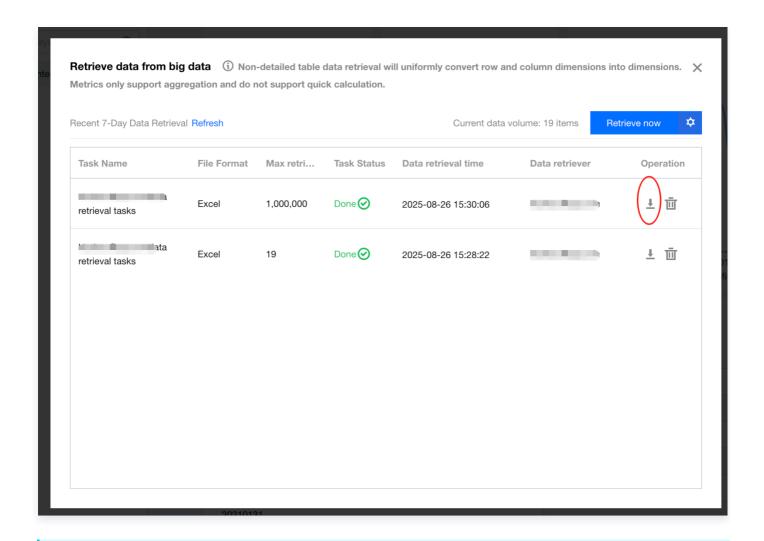
5. You can cancel a task in progress. Click the "Delete" icon, and the task will no longer execute.





6. When the data retrieval task is completed, you can click the download icon to initiate the data package download.



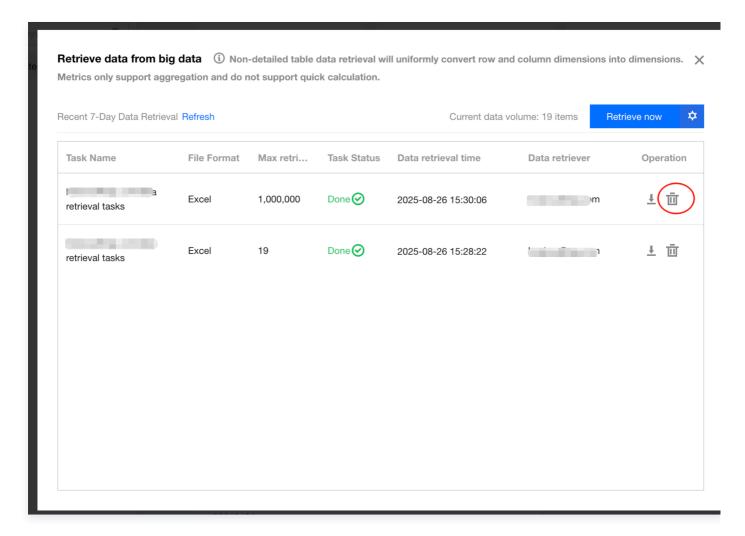


#### ⚠ Note:

Each Excel file supports up to 500,000 rows of data. If the data volume exceeds 500,000 rows, multiple Excel files will be generated (each with a maximum of 500,000 rows) and compressed into a ZIP archive.

7. When the data retrieval task is completed, users can delete the task. Deleting task will remove the data files and free up the storage space.





Data space before task deletion:



Data space after task deletion:





## Metric Alarms

Last updated: 2025-09-19 15:24:44

Metric alarms are proactive alarming behaviors aimed at the status of the report data analysis results. Through metric alarms, business personnel can instantly receive notifications about abnormal metrics, enabling quick identification of issues and the formulation of subsequent policies.

Metric alarms consist of 3 modules, including monitoring configurations, monitoring view, and monitoring management. Business Intelligence (BI) supports alarm message push via email and WeCom Robot (if available).

Edition support: Professional Edition.

Prerequisite: If you want to use WeCom for pushing alarm notifications, you need to first create a WeCom Robot. For reference, see WeCom Push.

This document introduces the following operations in a crosstab:

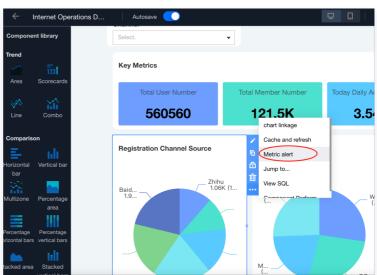
- Monitoring Configurations
- Monitoring Management
- Monitoring view.

## **Monitoring Configuration**

The monitored object is the component. Monitoring configurations are created and edited in the report editing mode.

1. Configuration path.

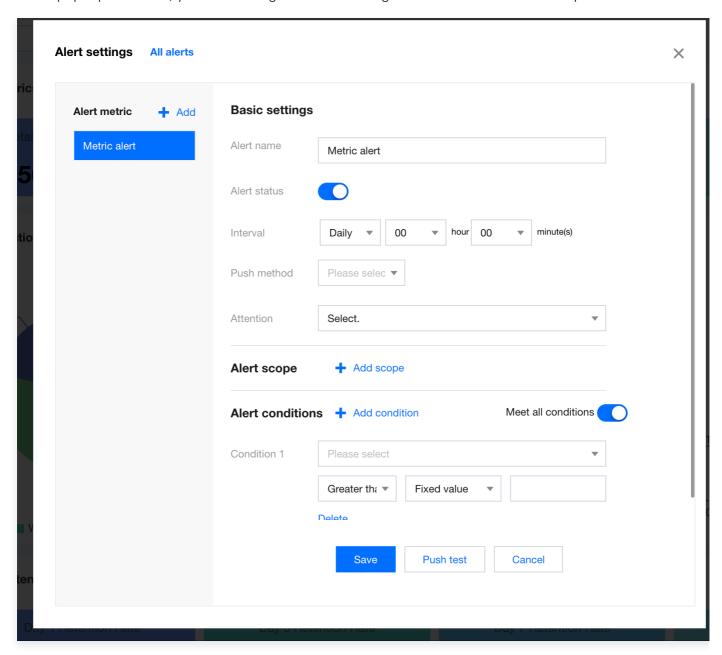
Go to the page editing mode, select the component, and choose "Metric monitoring" in the toolbar to



access the monitoring configuration page.



In the pop-up interface, you can manage all alarm configurations for the current component.



From the list on the left, you can add an alarm, select an existing one to edit, or delete an alarm.

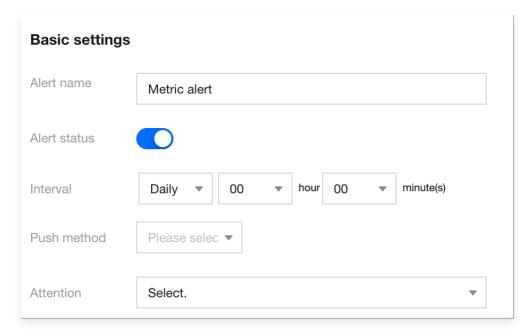
After completing the configurations, users can click "Push Test" to verify whether the alarm is working correctly.

#### 2. Adding and editing alarms.

Users can create an alarm by clicking the "+ Add" button on the left side. An alarm event requires configuring the following information.

Basic settings: Configure the basic alarm information and push methods.





- Alarm name: This name will be displayed in push messages. It is recommended to use easily recognizable terms, for example, "Daily Sales Below Average".
- Alarm status: When the status is on, the alarm will trigger monitoring, and push messages will be sent. Disabling this setting will pause the alarm task, and users can enable the setting again at any time.
- O Monitoring cycle: You can configure monitoring based on the granularity of month, week, day, or hour. The system will initiate the monitoring task according to the configured time. For example, to send a "Daily Report" at 8:30 every day, set the cycle to "Daily" > "08" hours > "30" minutes.
- Recommendation: Configure the monitoring cycle reasonably based on your business attributes.
   Excessive alarm frequency may lead to message delivery failures due to rejections by mail servers or third-party platforms.
- Push method: Currently, email and WeCom Robot are supported as push methods. It is
  recommended to use WeCom Robot for the timely receipt of alarm messages. The official email
  does not support hourly alarms (this will be available after the email server settings are supported in
  the future).
- Notification recipients: If email is used for push notifications, you need to select the notification recipients. The recipients should be users within the current project and should have their email addresses bound. For configuration details, refer to Platform User Management.
- Robot: If WeCom Robot is used for alarm notifications, a Robot needs to be selected (the alarm should be bound to this Robot). For Robot setup and management, see WeCom Push.

#### Note:

- A maximum of 5 alarms can be configured for each component.
- The WeCom Robot selected for the alarm needs to be bound to a "metric alarm" template. Otherwise, the Robot cannot be selected.

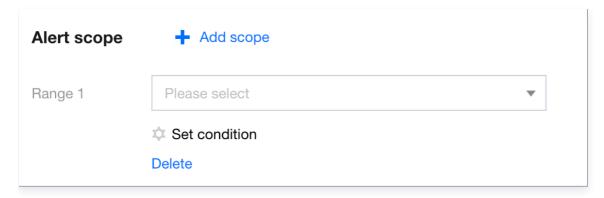


 If the Robot has been deleted in WeCom, BI cannot detect this change. Ensure that the Robot's status is properly maintained on the WeCom side.

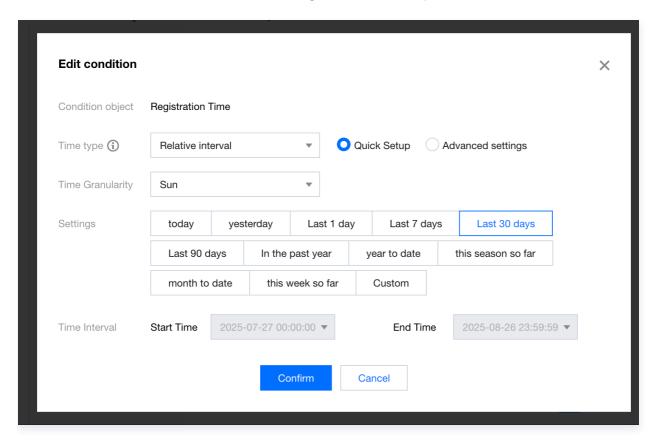
#### **Monitoring Scope Settings**

Users can define the data scope for monitoring. For example, if the scope is set to "last 30 days", data outside this period will not be tracked or trigger any alarms.

1. Click + Add Scope to add a monitoring scope and select the "Statistical time" dimension.



2. Click Set conditions and set the time range to "Last 30 days".



3. Click Delete. Upon secondary confirmation, the monitoring scope condition will be removed.

#### Note:

O If no monitoring scope is set, the alarm will track all result data of the current chart (that is, all



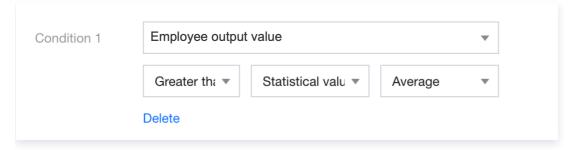
values within the chart's analysis results, excluding any data outside the analysis).

- O If multiple monitoring scopes are set, all scope conditions should be met.
- The monitored target is determined by the overlap between the monitoring scope conditions and the component's analysis conditions (as illustrated in the diagram below). For example, if the component's analysis condition is set to include "Beijing, Shanghai, Guangzhou, and Shenzhen" for the "Province" field, and the scope condition is set to include "Shanghai, Shenzhen, Shandong, and Henan", the monitored target will be "Shanghai and Shenzhen".
- Of the data table associated with the chart is bound to user tags (row/column level permissions), the alarms may include data that certain users do not have permission to access. For example, even if User A is only authorized to access data where the "Province" field value is "Shanghai", the system might still push alarms containing the "Shenzhen" data to the user. Therefore, it is recommended to carefully select the recipients when configuring alarms.

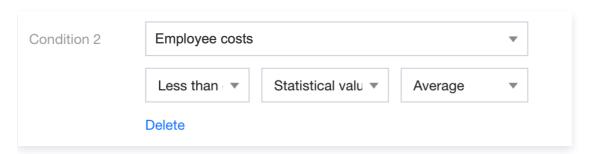
#### **Alarm Condition Settings**

Users can set conditions for triggering monitoring. For example, monitoring data with "employee output value greater than the average" and "employee costs less than 70,000". An alarm will be triggered when the "employee output value" exceeds the average and the "employee costs" are below 70,000.

1. Click + Add Conditions to add a condition. Select the "Employee output value" metric, set the logical condition to "Greater than", set the value type as "Statistical value", and set the value as "Average". You can add a minimum of 1 condition and a maximum of 5 conditions.



2. Click + Add Conditions to add a condition. Select the "Employee costs" metric, set the logical condition to "Less than", set the value type as "Fixed value", and set the value as "70,000".



3. Set the condition relationship and select "Meet all conditions".

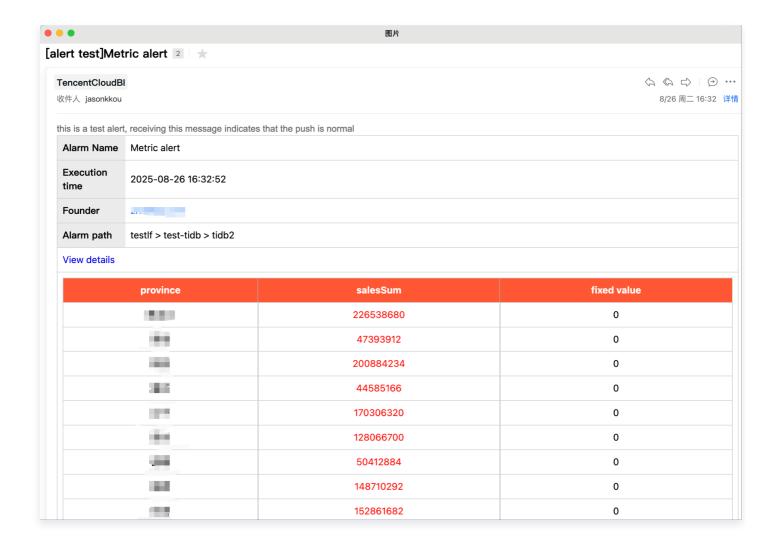




4. Click **Delete** to remove this condition.

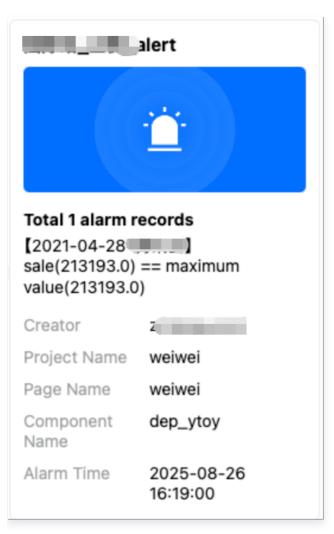
#### **Push Test**

Once the configurations are complete, you can verify the current configurations by using the Push Test feature, which sends a test message in real-time to the corresponding recipients. The push test does not trigger an actual alarm but simply verifies whether the push channel is working properly. The email push message example:



The Robot push message example:



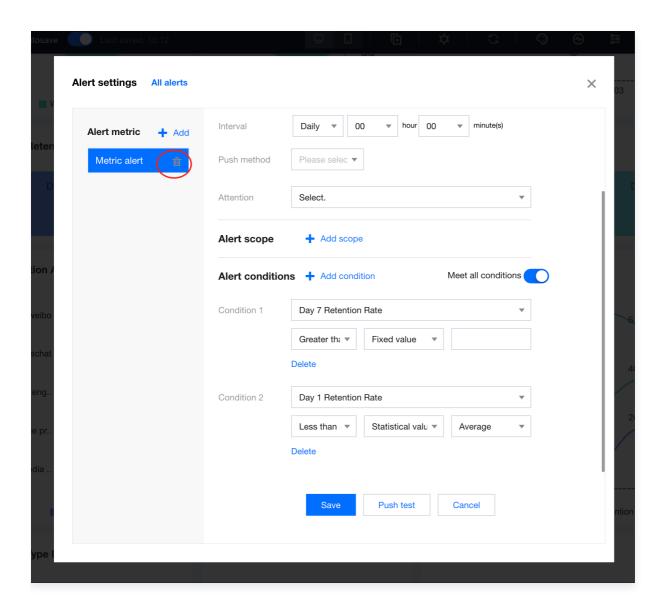


If the test content is received in the email or WeCom group, it indicates that the push settings are working properly. The user can then save the alarm settings. (After the settings are saved, ensure that the business has been published. Otherwise, a push exception will occur during subsequent notifications.)

## **Deleting Alarms**

To delete an alarm, hover over the alarm in the alarm list, and click the **Delete** icon. After the second confirmation, the alarm will be deleted.

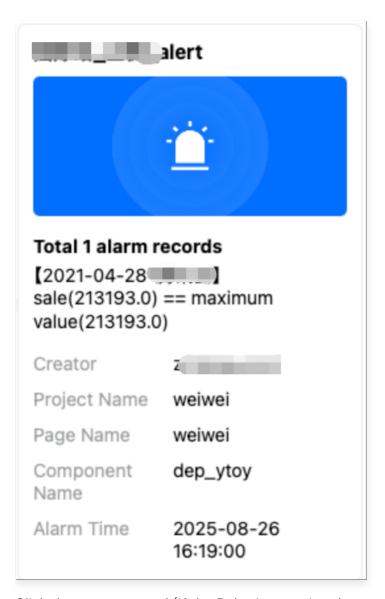




## **Monitoring View**

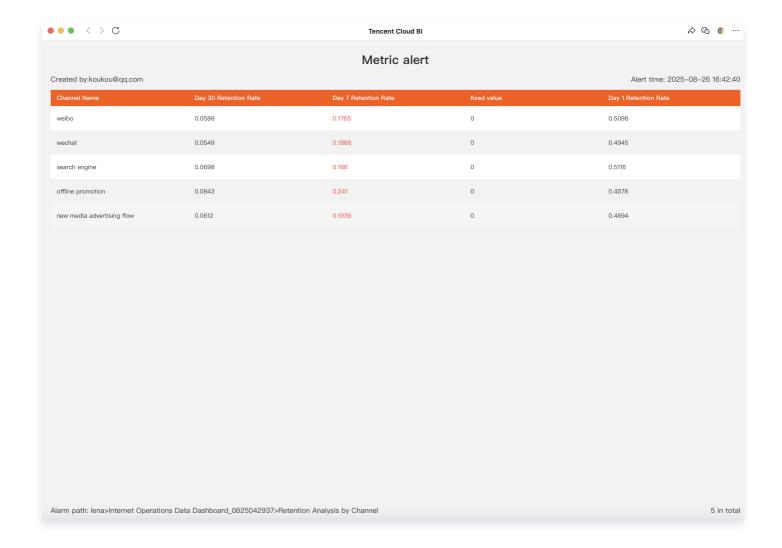
Users can receive monitoring alarms via email or the WeCom group. The alarm effect is as follows (using WeCom Robot as an example).





Click the message card (if the Robot's associated message template does not support this action, no details are available) to access the detailed 58 records.

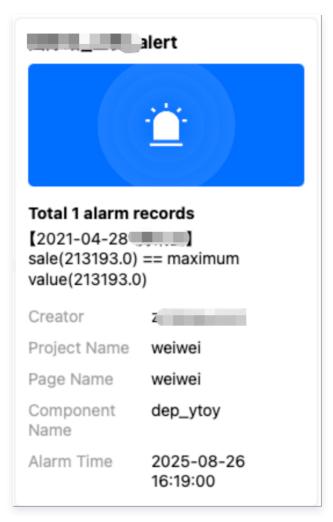




#### Note:

- 1. The data displayed in the details reflects the results of the task execution at that moment, not the most recent data. For instance, if 10 alarms were triggered yesterday and none today, accessing the details from yesterday's alarm message will show 10 alarms.
- 2. Monitoring alarms depend on the status of the page and push channels, including whether the page is published or deleted, whether data access is functional, and whether the WeCom Robot is deleted. During the execution of a monitoring task, if the page is inaccessible, an exception message will be sent to the recipient for timely awareness, as shown below:





- 3. If the page is unpublished, an alarm exception push notification will be triggered. Be sure to complete editing the page and publish the page.
- 4. Currently, no permissions are set for viewing the monitoring details page. Therefore, manage the recipients of the push notifications carefully.

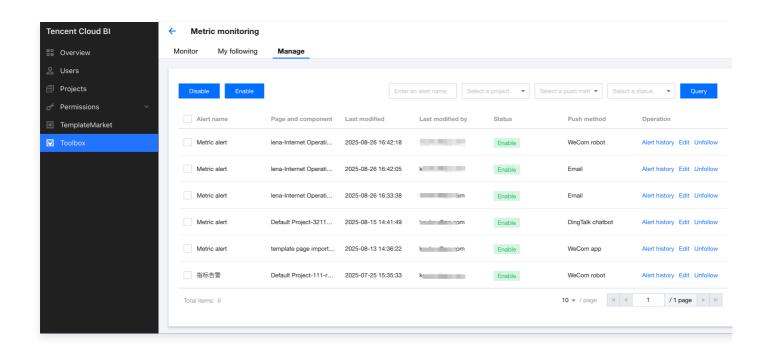
## **Monitoring Management**

Users can manage all alarms centrally. Currently, only enterprise administrators and project administrators are allowed to view and manage alarms. Enterprise administrators can manage alarms across all projects within the enterprise, while project administrators can only manage alarms for the projects to which they are assigned.

1. Monitoring Management

Through monitoring management, administrators and authorized personnel can manage current monitoring tasks, including enabling, disabling, and quick editing.



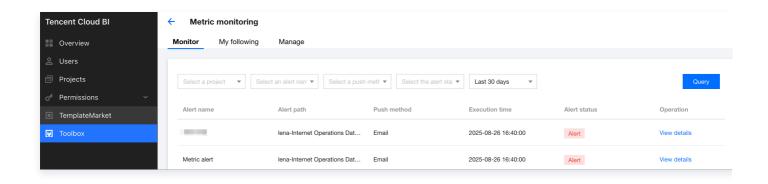


- Enable and disable: Select the checkboxes on the left side of the list, and click the Enable or Disable buttons to enable or disable the selected tasks. When the task is disabled, the system will pause the push notifications. Enabling the task will resume the push notifications.
- Alarm records: Click "Alarm Records" to quickly redirect to the "Monitoring Records" page, where
  you will be directed straight to the records of the selected alarm.
- Edit: Click "Edit" to quickly redirect to the editing page and open the alarm settings for quick modifications.
- Follow and unfollow: By default, the project administrators and creator will automatically follow the alarm after the alarm is created. Users can manually change the follow status. Once a monitoring task is followed, the task will appear in the "My Follows" page for easier management of alarms that require attention.

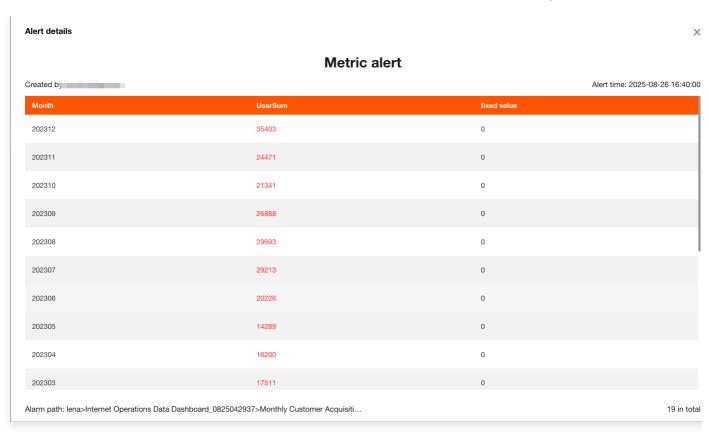
#### 2. Monitoring records.

From the monitoring record list, users can view the status and monitoring information of each monitoring task, including the push method, alarm path, and execution time.





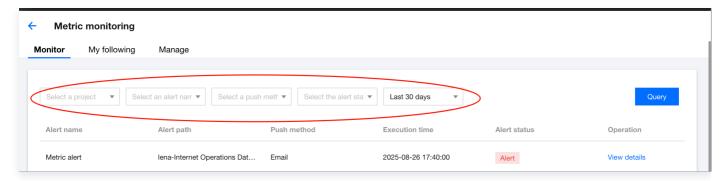
Click View Details to check the detailed content of this alarm, as shown in the diagram below:



In the list, users can use the filter feature to filter records based on conditions, including project, push



method, and more.



#### 3. My followings.

By selecting "Follow" in the monitoring management page, users can bookmark the alarms they are tracking. The "My Followings" page operates similarly to the "Monitoring Records" page, displaying only the monitoring records generated by the monitoring tasks currently being followed.



## Data Security Watermarks

Last updated: 2025-09-19 15:24:44

The watermark feature in report dissemination allows tracking the origin of data leaks, minimizing data breach risks.

Tencent Cloud Business Intelligence (BI) supports image and text watermarks, with text watermarks enabling the insertion of dynamic variables, including user information.

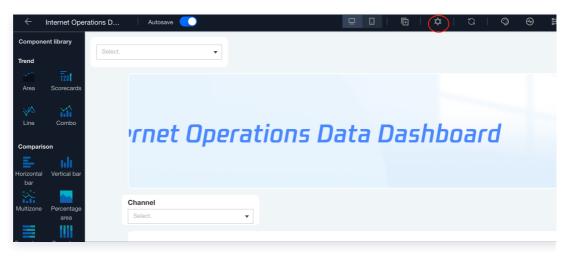
Edition support: Basic Edition, and Professional Edition.

In this document, you will learn:

- How to set up image watermarks.
- How to set up text watermarks.
- How to set up dynamic text watermarks.

### **Setting up Watermarks**

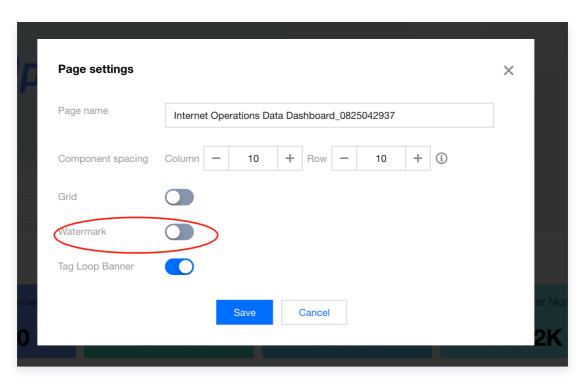
- 1. Enable or disable the watermark feature.
  - 1.1 Go to the page editing interface: the console > the project > the page > edit.
  - 1.2 Click the "Page Settings" icon to open the page settings pop-up layer.

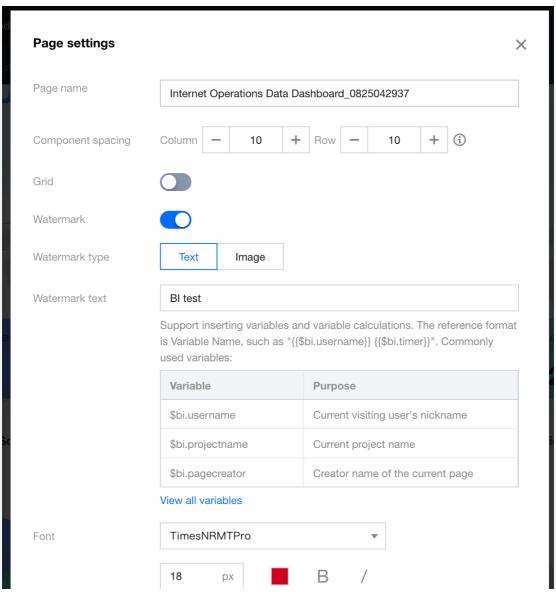


1.3 In the watermark settings, you can enable or disable the watermark feature.

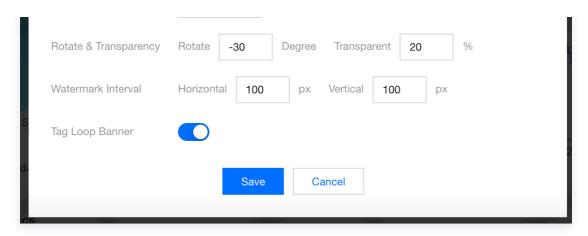










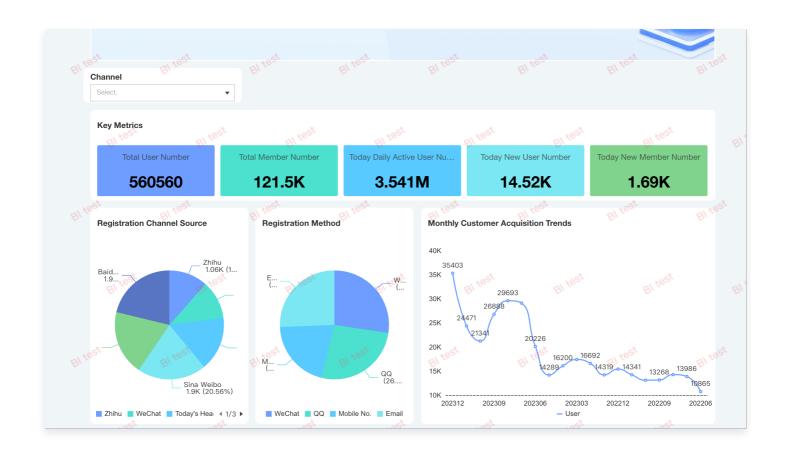


#### 2. Text watermark settings.

When the watermark type is set to "Text", the following options can be configured.

Setting Item	Description	Example
Watermar k text	Support both static value input and variable value input based on the interface instructions.	<ul> <li>To show "For internal circulation only", you only need to enter "For internal circulation only".</li> <li>To display the current account ID in the report watermark, enter "{{\$bi.subuin}}".</li> </ul>
Text style	Support font type, text size, text color, bold, and italic formatting.	_
Rotation & transpare ncy	Support rotation angle and transparency.  Rotation: Support –360 to 360 degrees, with the horizontal 3 o'clock position as 0 degrees. Positive values represent clockwise rotation, while negative values represent counterclockwise rotation.  Transparency: Support a range of 0 to 100 to adjust the watermark's transparency.	
Watermar k spacing	Support setting the horizontal and vertical spacing between 2 watermarks.	_

The effect after enabling the text watermark:



#### 3. Image watermark settings.

When the watermark type is set to "Image", the following options can be configured.

Setting Item	Description	Example
Waterma rk image	Support JPG, PNG, and GIF formats (dynamic GIF images will be converted to static, displaying only the first frame), with an image size of less than 2MB.	_
Display size	By default, the image will be displayed in its original size. For images that are too large or too small, you can adjust the display area. After the adjustments are	The original image size is 2000 x 1000. To avoid distortion and prevent the image from covering the entire chart, you can set



	completed, the image will be proportionally scaled and displayed in the center within the designated size area.	the image to display as a 200 x 100 image in the report.
Rotation & transpar ency	<ul> <li>Support rotation angle and transparency.</li> <li>Rotation: Support -360 to 360 degrees, with the horizontal 3 o'clock position as 0 degrees. Positive values represent clockwise rotation, while negative values represent counterclockwise rotation.</li> <li>Transparency: Support a range of 0 to 100 to adjust the watermark's transparency.</li> </ul>	
Waterma rk spacing	Support setting the horizontal and vertical spacing between 2 watermarks.	-

The effect after enabling the image watermark:



#### Other Notes

- If the edition in use does not support variables or the variable parsing fails, the variable part will be displayed as empty (for example, "Viewer{{viewer}}" will show as "Viewer" if the variable "viewer" cannot be parsed).
- After the page is shared, variables related to the user identity, including the user UIN, cannot be
  read. Therefore, if the watermark contains variables for the visitor identity information, the variables will
  fail to parse. However, the creator information can still be parsed.
- Push notifications will not display watermarks in screenshots.



# Parameter Construction URL Page Parameter Construction

Last updated: 2025-09-19 15:24:44

In the sharing or embedding scenarios, when a user opens a page, we may want to apply default filters to the data, for example, displaying only data for a specific department. Business Intelligence (BI) enables data interaction between parameters and page components by adding parameters to the URL.

#### Prerequisites:

This document only introduces the parameter construction in the URL. To learn about the complete
process, refer to the related documents on Sharing and Page Embedding.

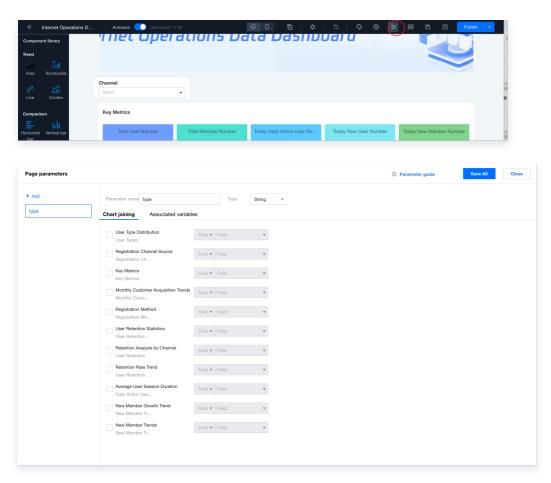
In this document, you will learn:

- How to construct a single parameter.
- How to construct multiple parameters.

## Constructing a Single Parameter

1. Obtain the parameter name: Obtain the parameter name through the Page Parameters feature.





As shown in the image above, we obtain the parameter name "type".

2. Assemble the parameter body: Use the following format to assemble the parameters to be passed.

```
/* Format */
value=${parameter_value}&target=${parameter_name}

/* For example, the following is equivalent to province being
Shanghai. */
value=Shanghai&target=province
```

#### 3. URL transcoding:

O In a non-coding environment, you can also handle the parameters easily using the following format.

```
/* Format */
params[]=value=${parameter_value}%26target%3D${parameter_name}

/* For example, the following is equivalent to province being
Shanghai. */
```



```
params[]=value=Shanghai%26target%3Dprovince
```

- Most browsers support transcoding Chinese characters. If the automatic transcoding fails, you can search for the online tool "urlEncode" to transcode the Chinese manually.
- If generating links in batches with code, you can use the encodeURIComponent method to encode the parameter body.

```
//encodeURIComponent is the URL format conversion function.

const str1 = `value=Shanghai&target=province`

const paramsStr1 = `params[]=${encodeURIComponent(str1)}`
```

4. Handling multiple values for a parameter: If a parameter has multiple values, different values can be separated using a comma ",".

```
/* For example, the following is equivalent to province being Shanghai
or Guangdong or Shaanxi. */
params[]=value=Shanghai, Guangdong, Shaanxi%26target%3Dprovince
```

## **Constructing Multiple Parameters**

When multiple parameters need to be passed, simply construct the parameters based on the single parameter format as shown below.

```
/* Format */
params[]=value=${parameter_value}%26target%3D${parameter1}
¶ms[]=value=${parameter_value}%26target%3D${parameter2}

/* For example, the following is equivalent to province being Shanghai
and department being Operations Department. */
params[]=value=Shanghai%26target%3Dprovince¶ms[]=value=operations_depart
ment%26target%3Ddepartment
```