Business Intelligence

Platform Management

Product Documentation

Contents

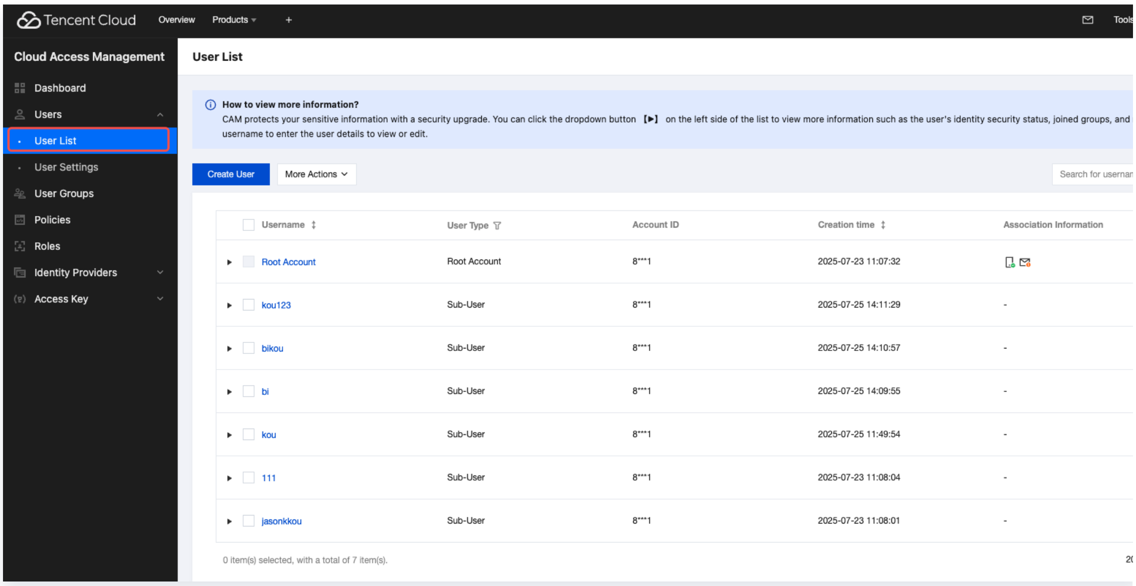
Platform Management
Account and Permission Management
Granting BI Permissions

Last updated： 2025-09-19 15:30:17

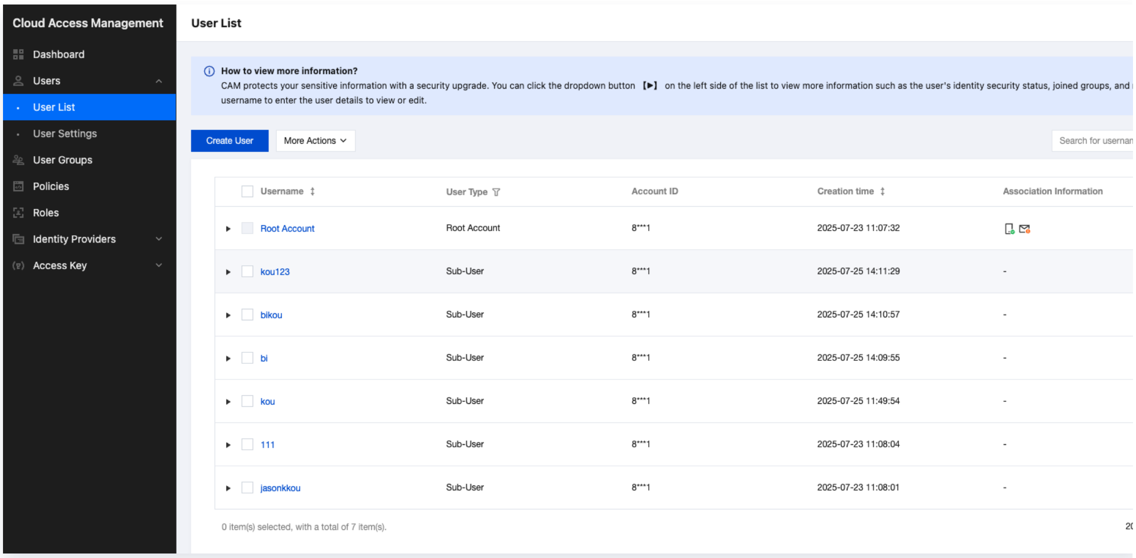
This document explains how to grant access to Business Intelligence (BI) for CAM sub-accounts, including first-time users and those who need permissions to use the BI products, through the Tencent Cloud console.

Operation Steps

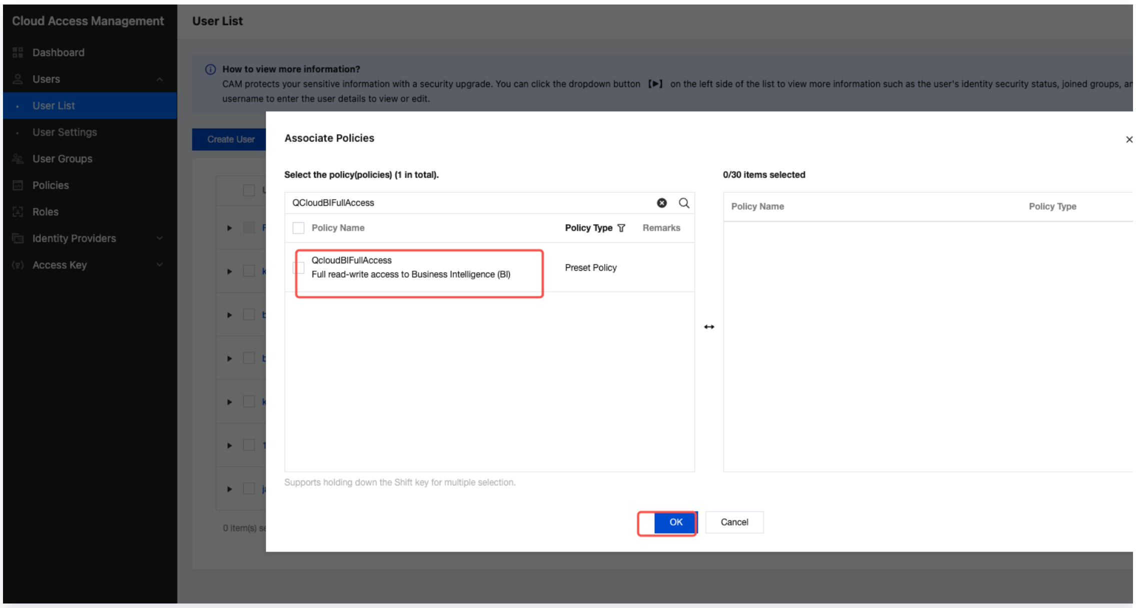
1. Click the avatar in the upper-right corner to go to the Cloud Access Management (CAM) page.
2. Go to User > User List page.



3. Click Authorize in the operation column of the sub-account that requires permissions.



4. Select the corresponding BI policies from the policy list, and click **OK** to complete the authorization.



5. If the user is logged in and indicates no permission, logout and log in again to attempt (existent cache).

User Permissions
Platform User Management

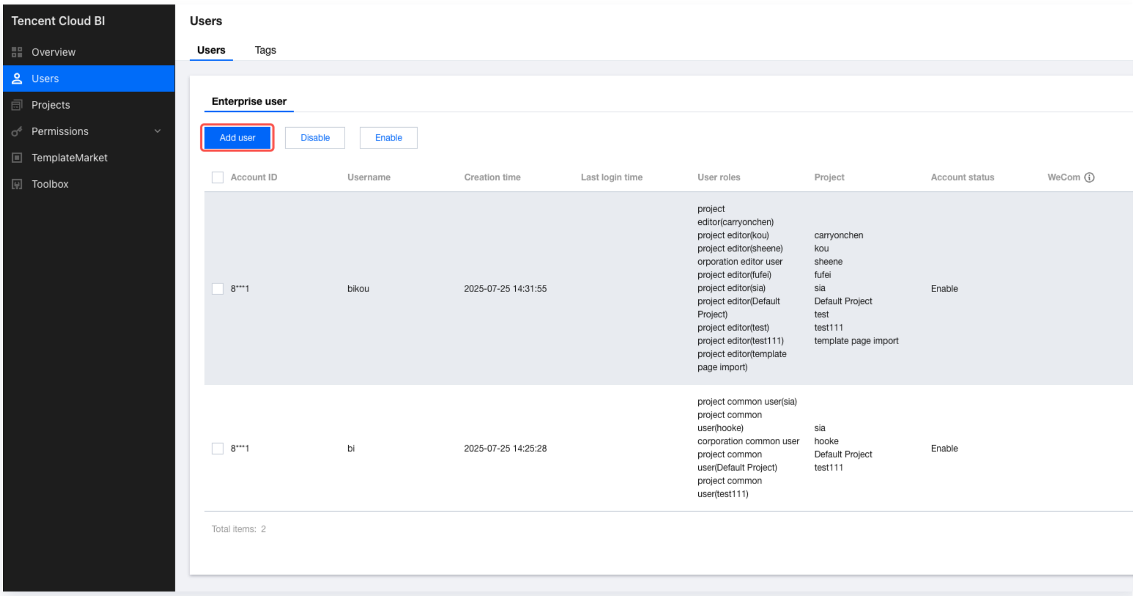
Last updated：2025-09-19 15:30:17

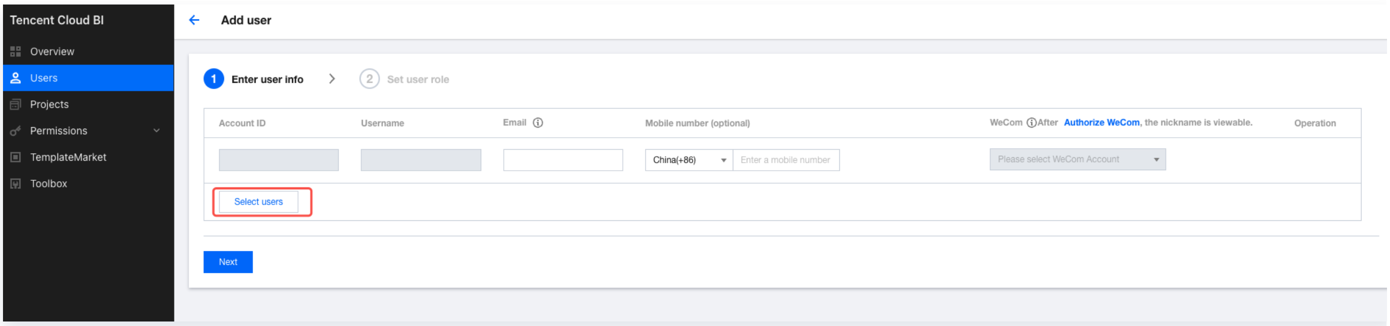
This document explains how to manage users. If you are activating a CAM sub-account to access Business Intelligence (BI) for the first time, start by granting BI access permissions to the CAM sub-account.

Adding Users

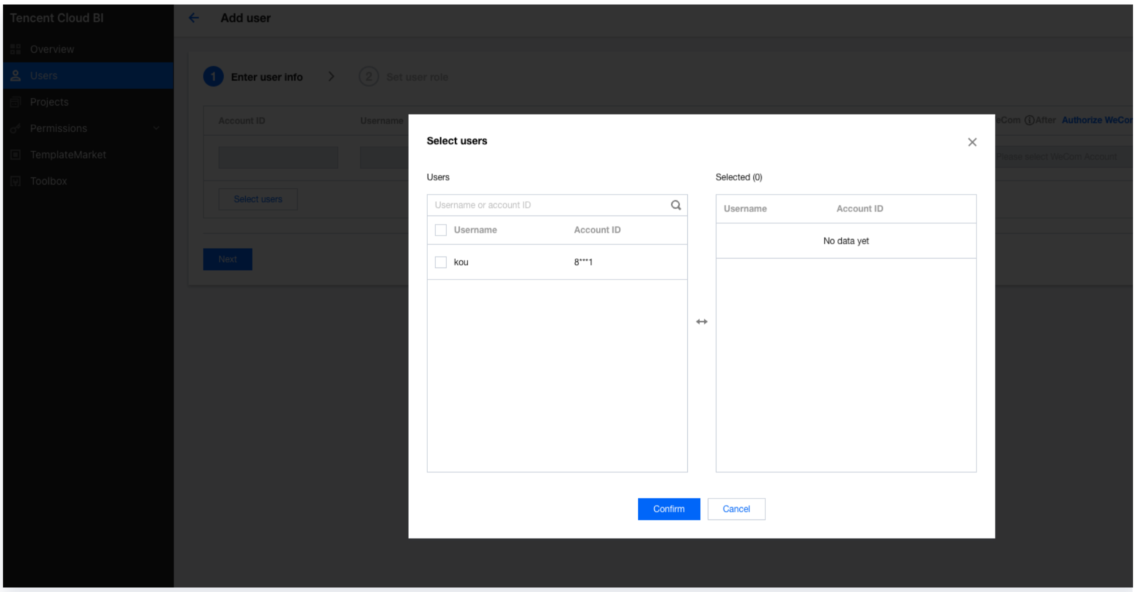
Operation steps for adding users.

1. Go to the user management page.
2. Click **Add User** to go to the user addition page.

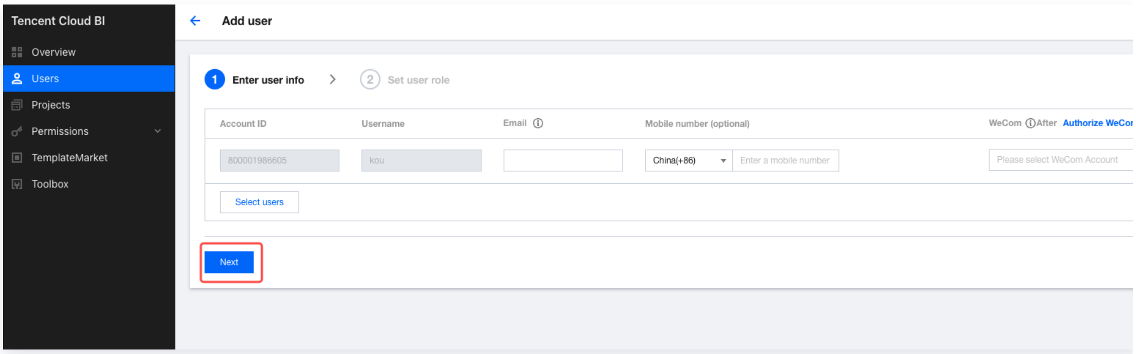


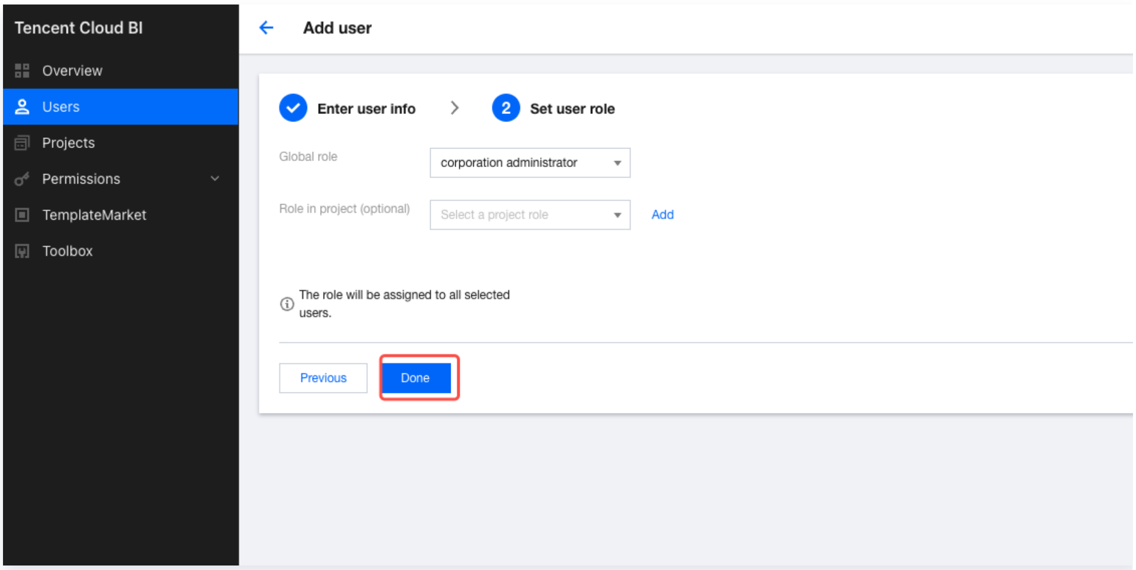


3. Click **Select Users**, select the sub-accounts that need access to BI in the pop-up window. After confirmir



4. Configure user roles. Click **Done** to complete the user addition.

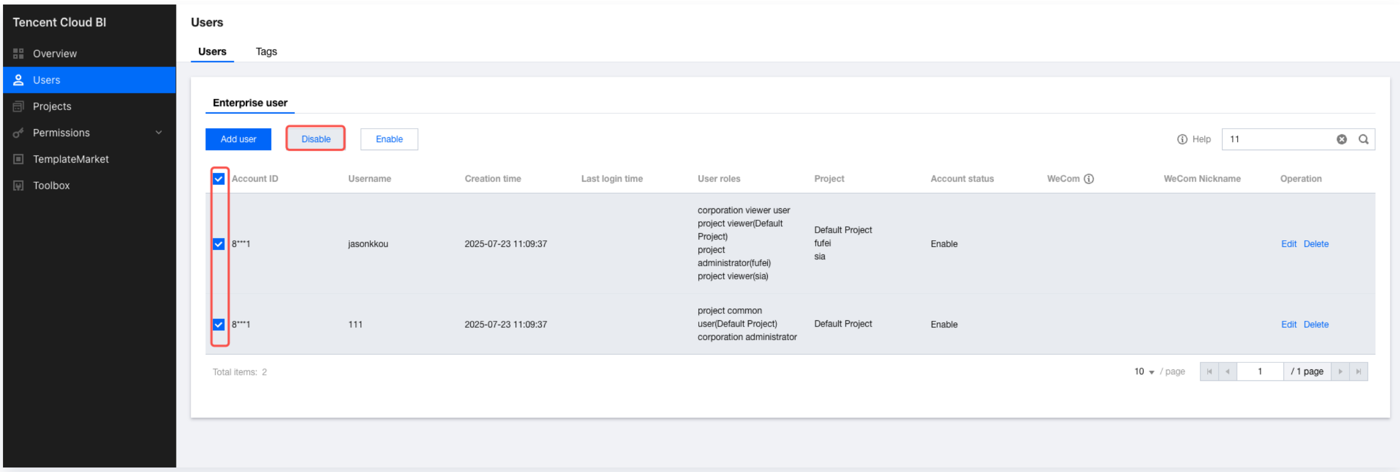




Disabling Users

Operation steps for disabling users.

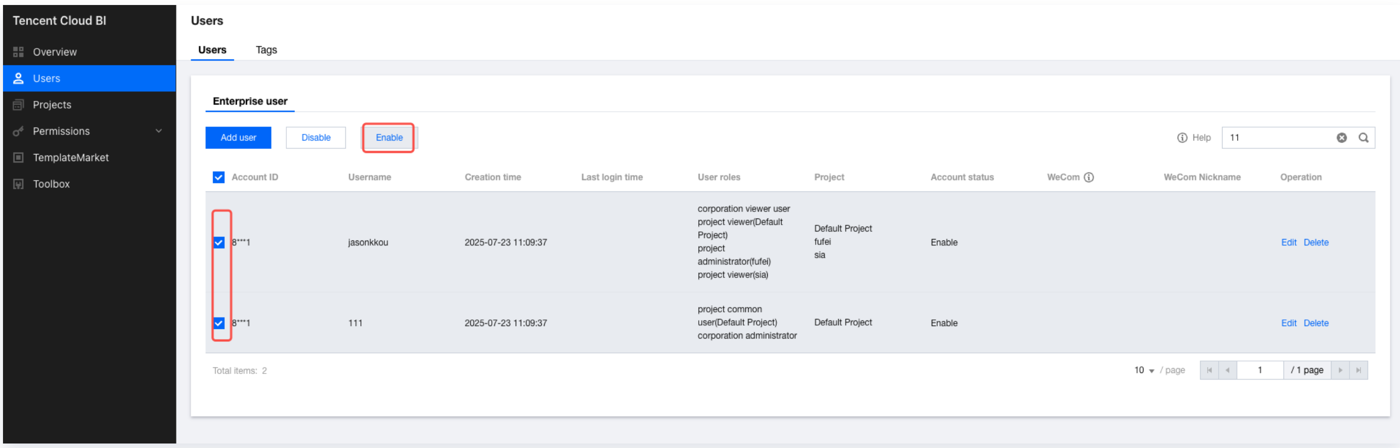
Go to the user management page, select the sub-accounts you want to disable (the root account does not support disabling and cannot be selected), and click the **Disable** button.



Enabling Users

Operation steps for enabling users.

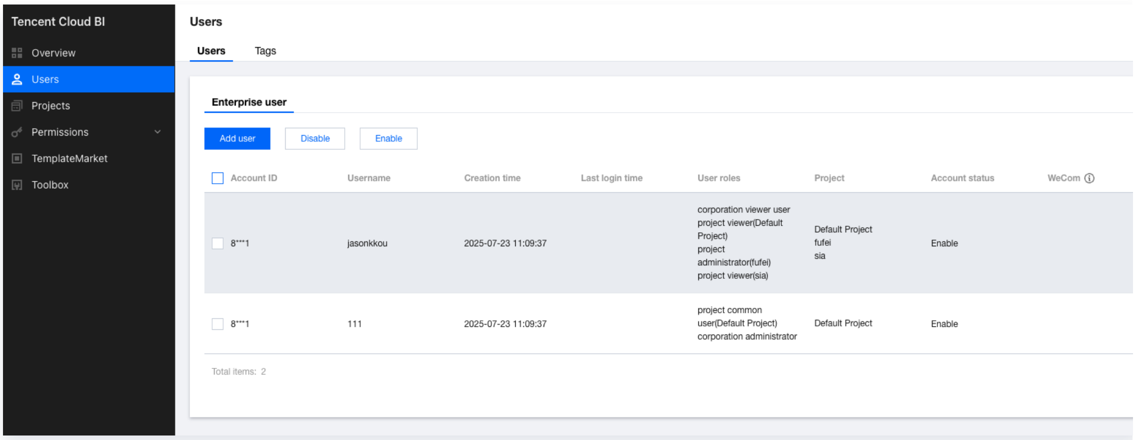
Go to the user management page, select the sub-accounts you want to enable, and click the **Enable** button.



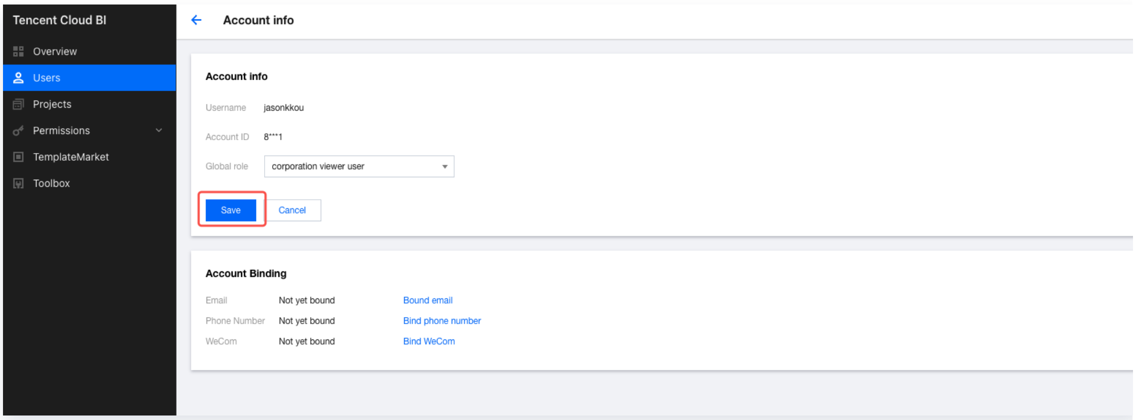
Editing Users

Operation steps for editing users.

1. Go to the user management page, and click **Edit** in the operation column of the corresponding user.



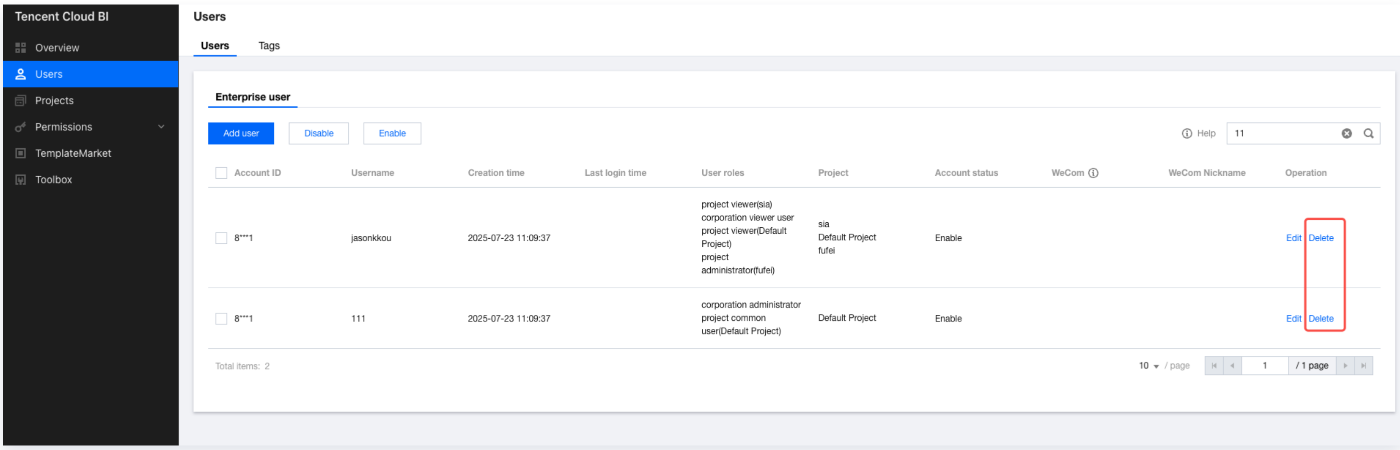
2. Go to the account information editing page, modify the user account information, and click **Save** to apply root account can only be the enterprise administrator.)

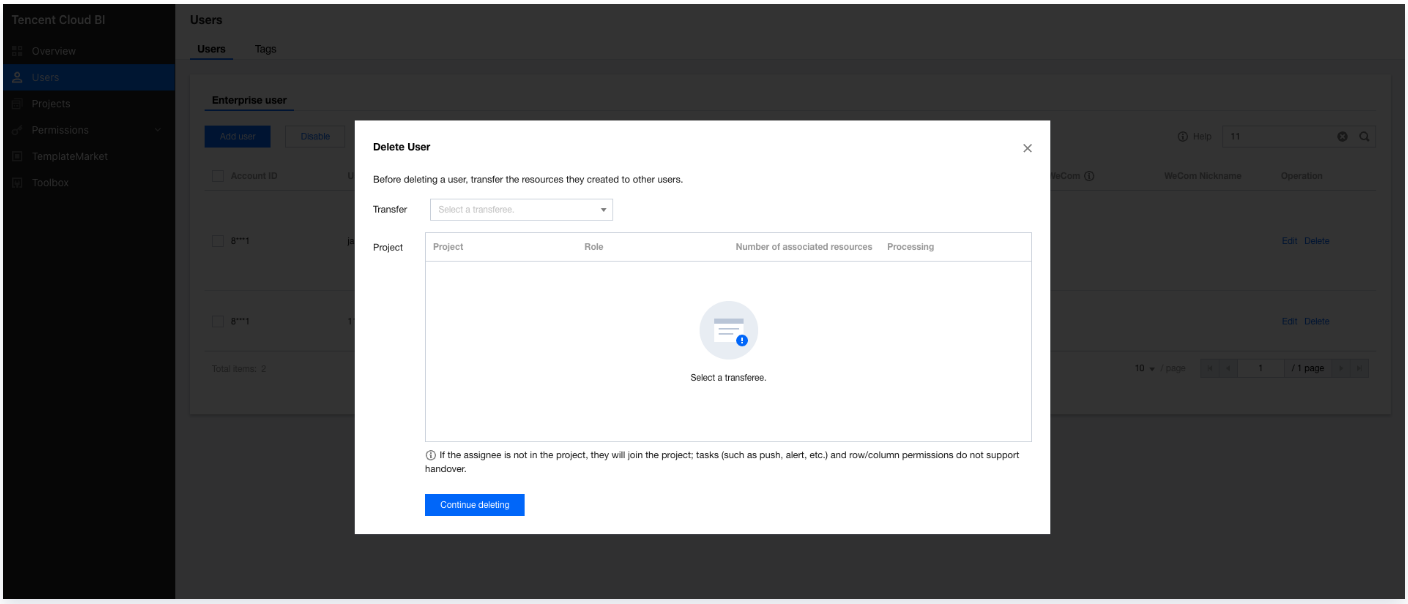


Deleting Users

Operation steps for deleting users.

Go to the user management page, click Delete in the operation column of the corresponding user, and confirm in the pop-up window.





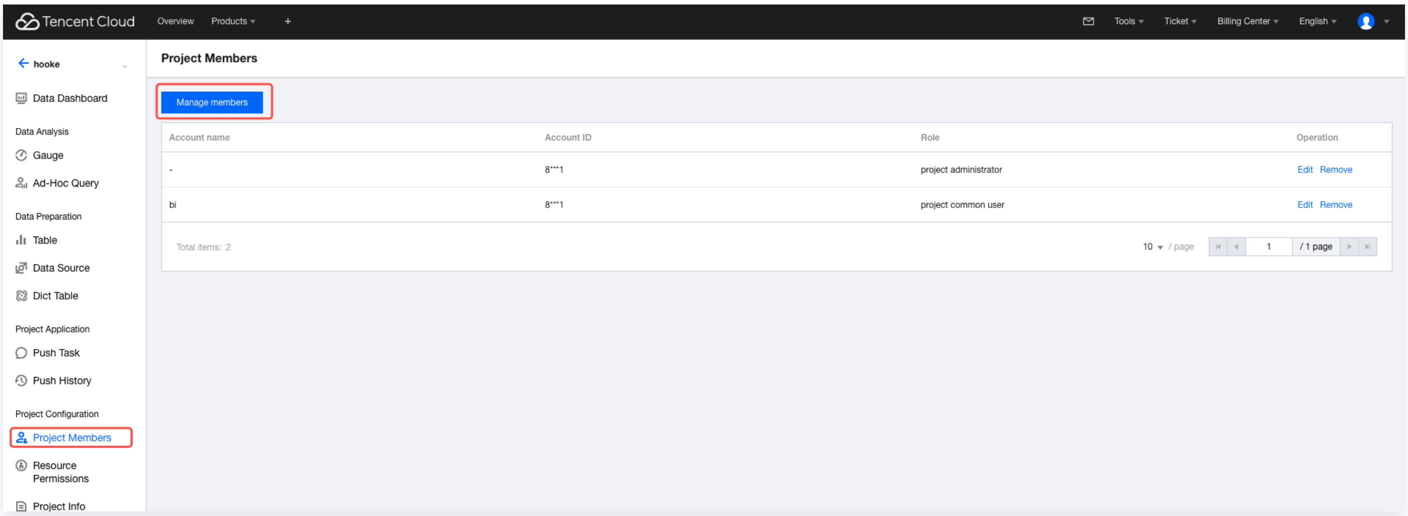
Project Member Management

Last updated：2025-09-19 15:30:17

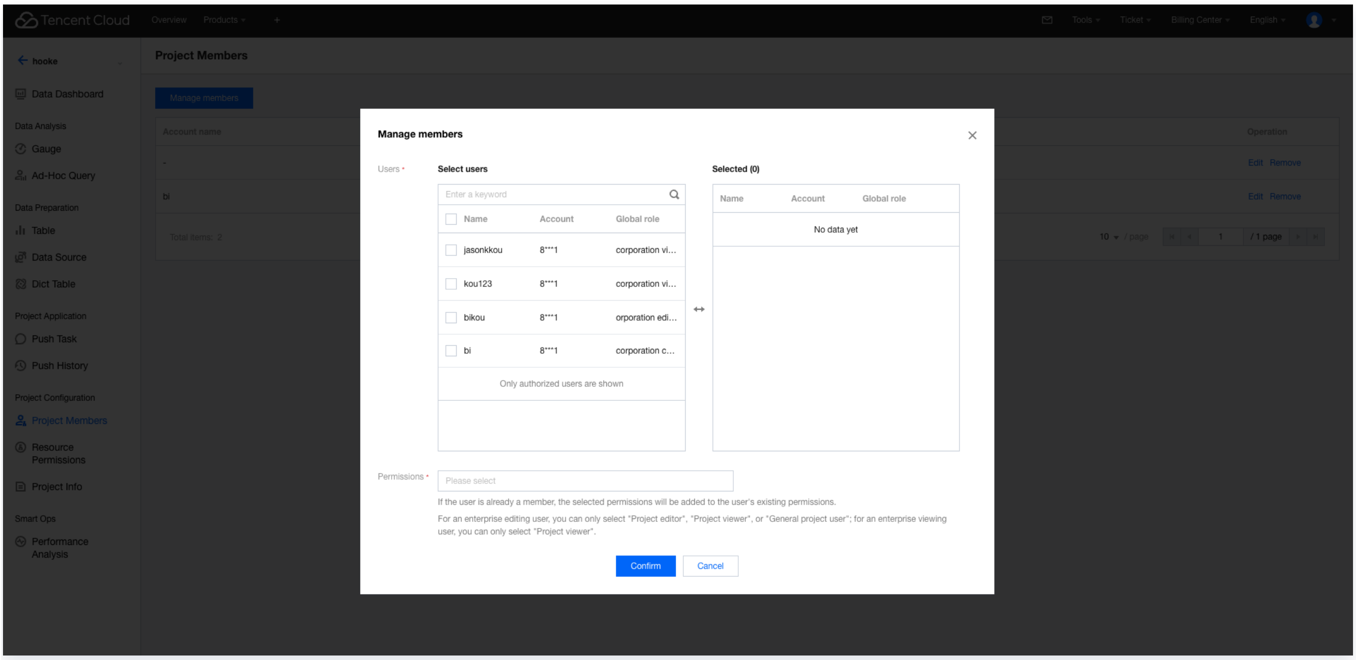
In Business Intelligence (BI) projects, you can add and remove project members through member management in the project configurations. The following content introduces the specific operation steps and procedures.

Configuring Project Members

Click **Configure Members** in the project configurations.

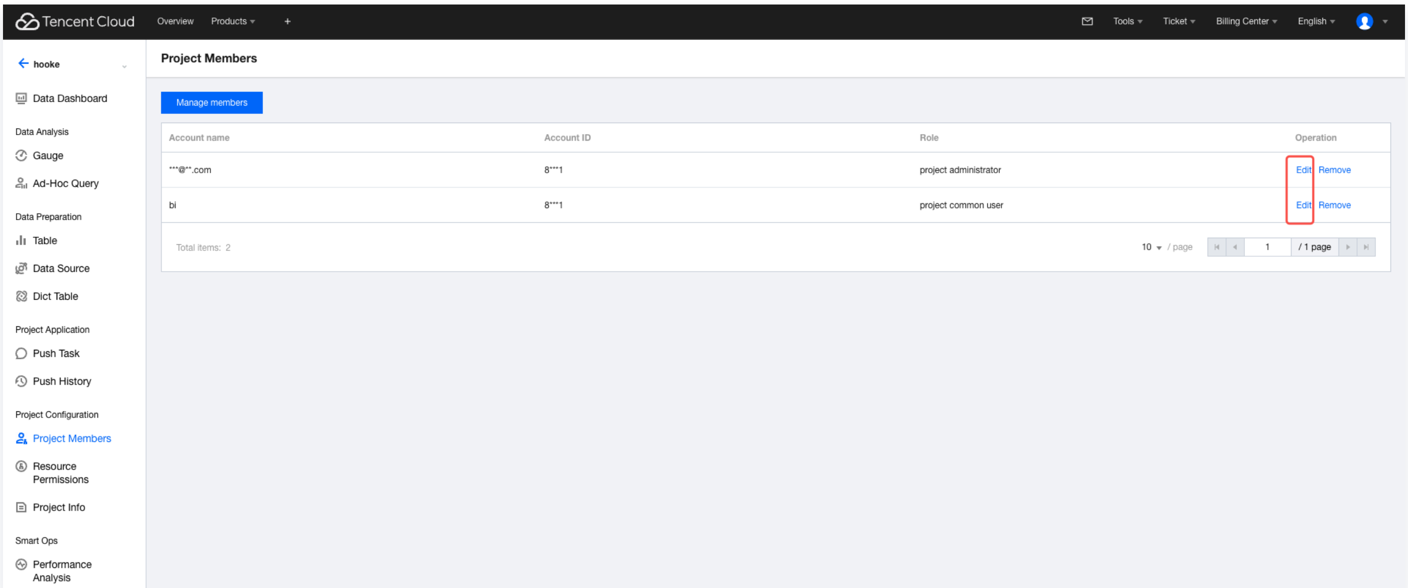


Go to the member configuration interface to add or remove authorized users and configure permissions. Available permission types include project administrator, project editor, project general member, and project viewer (multiple roles can be selected).

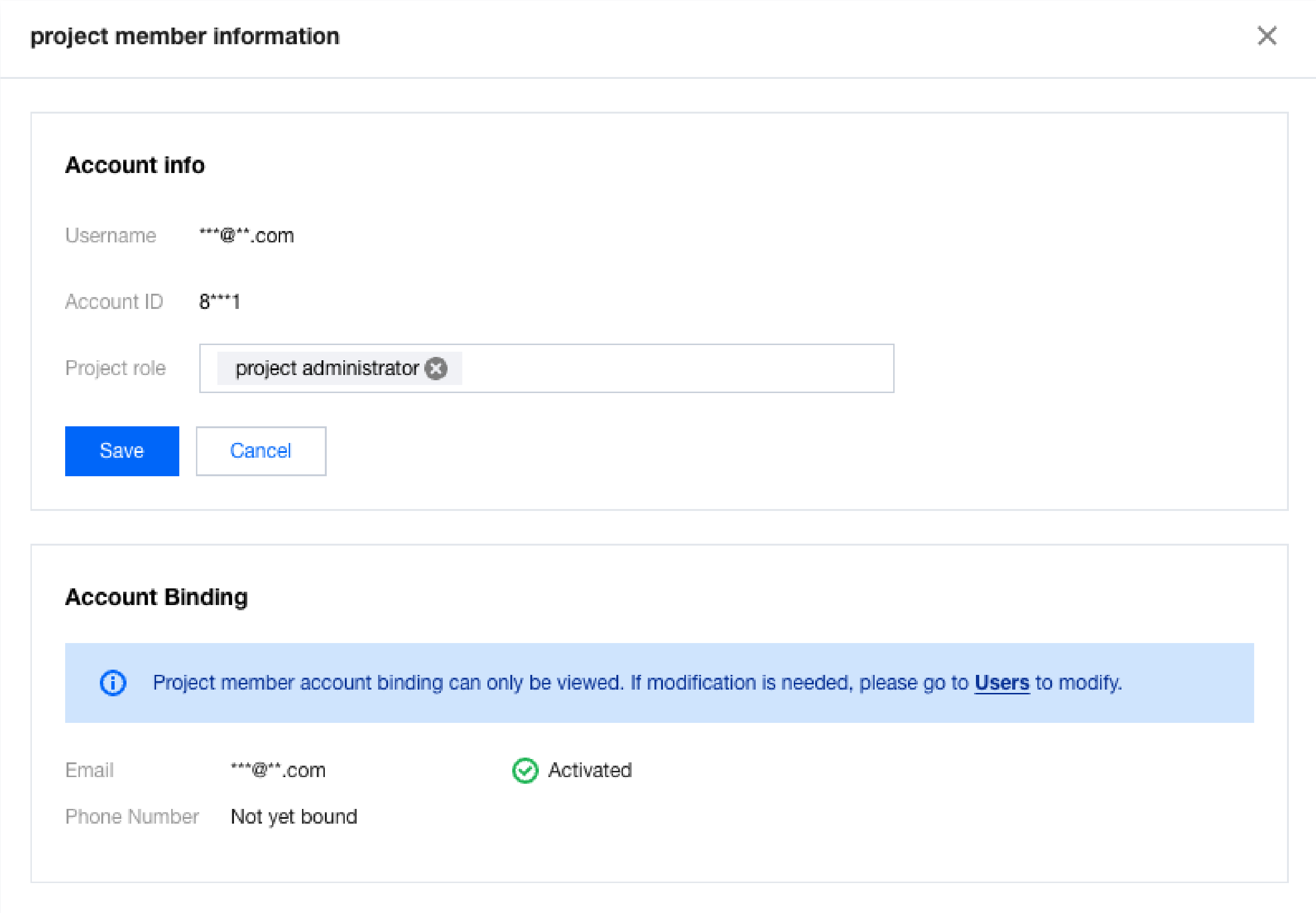


Other Operations

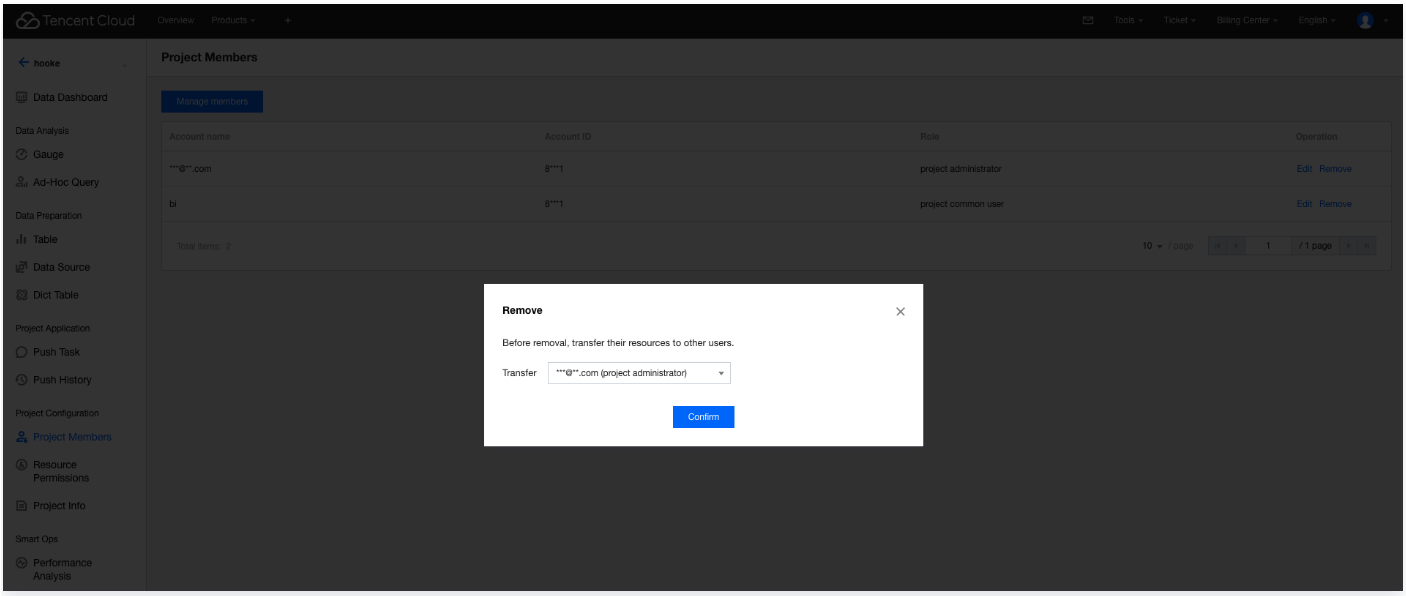
In the member management list, you can perform the **Edit** and **Remove from Project** operations.



Click **Edit** to modify the project member's **email and granted roles**.



Click **Remove from Project** and upon confirmation, the member will be removed from the project.



User Tag Management

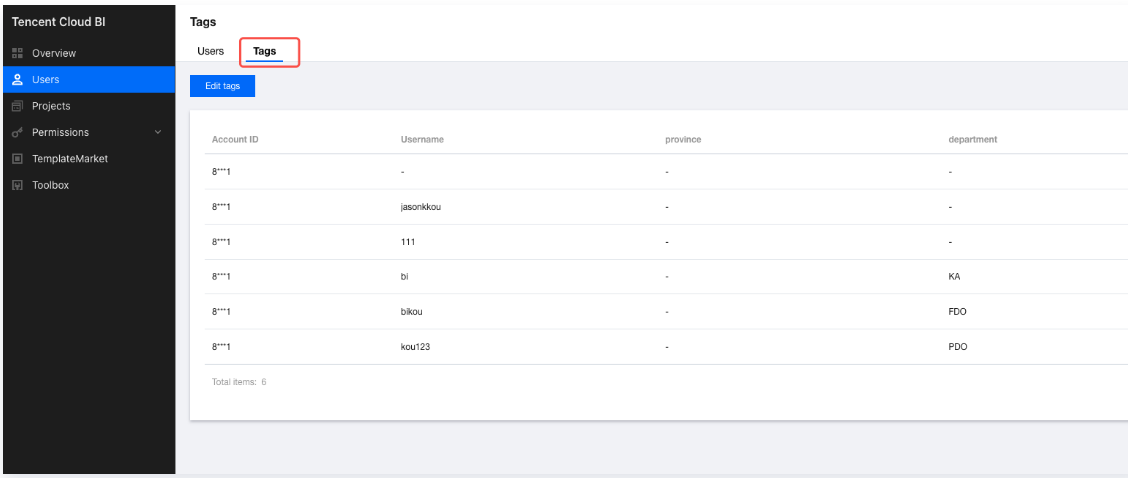
Last updated：2025-09-19 15:30:17

User tag management allows you to group users for management and support tag group-level user permission control. For example, you can assign user tag A and user tag B to manage permissions for multiple users in batches.

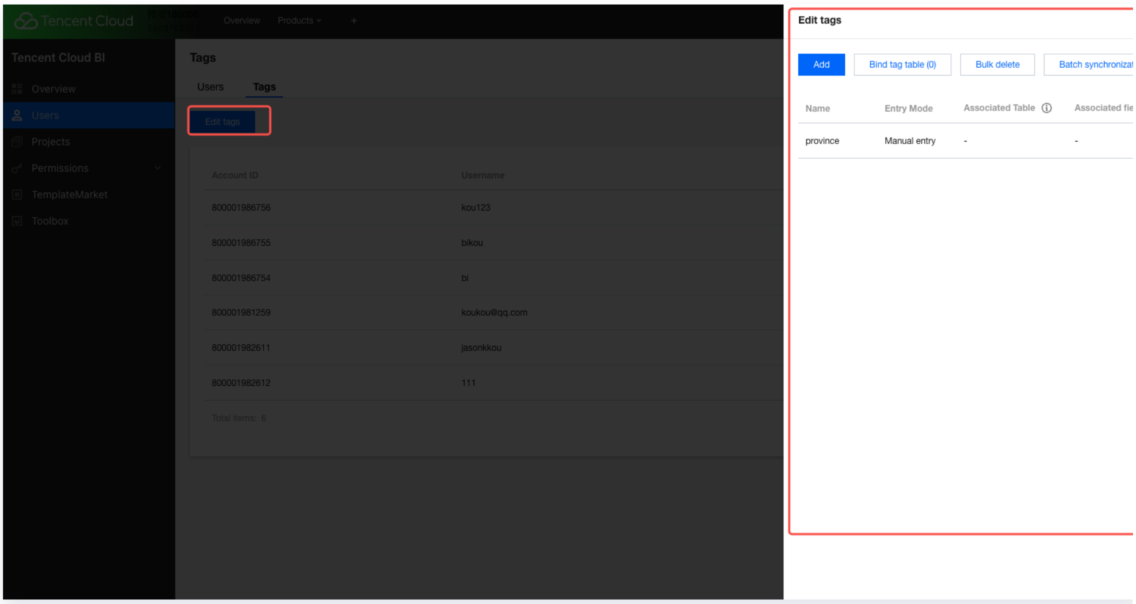
Editing Tags

Operation Steps for Adding Tags

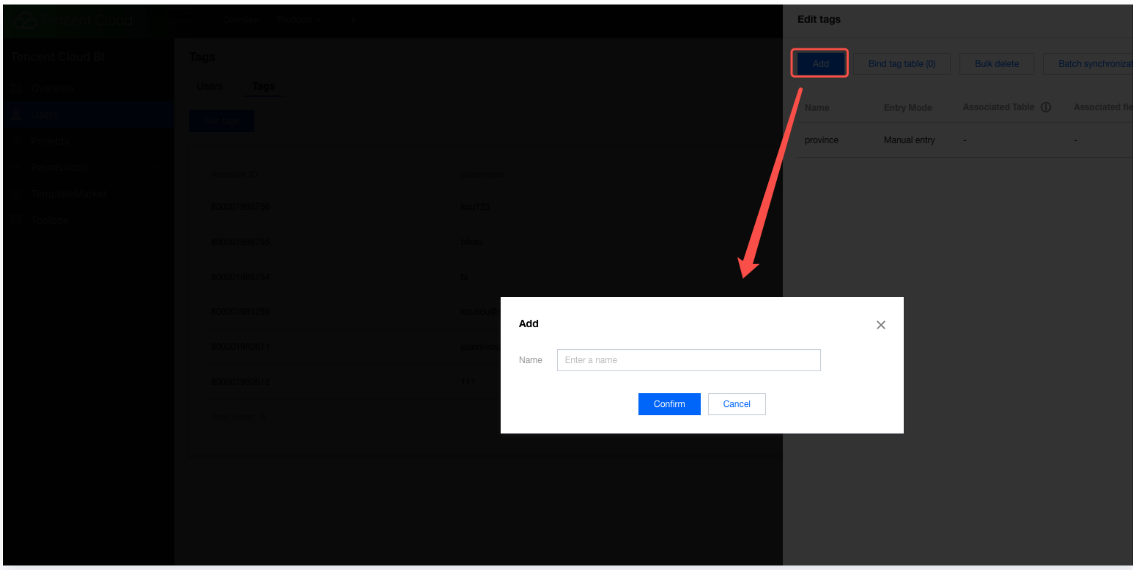
1. Go to the User **Management page** > **Tag Management** tab.



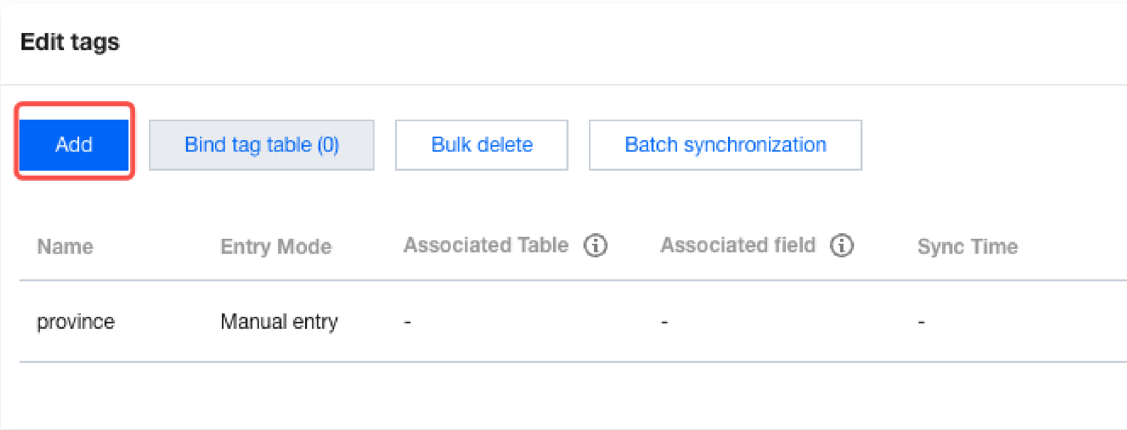
2. Click **Edit Tags**, and a drawer will slide out from the right.



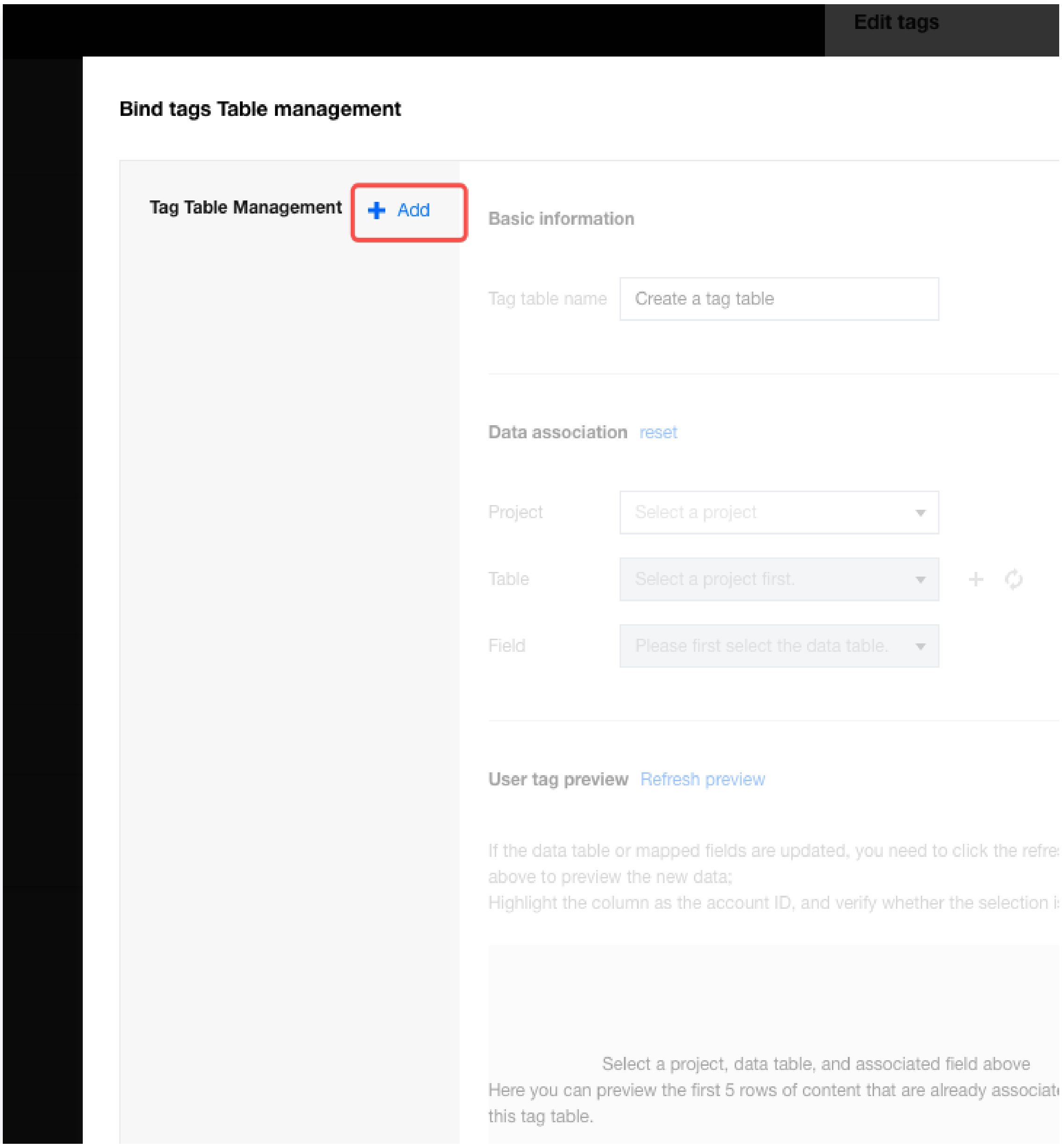
3. Click **Add Tags**, enter the tag name in the pop-up window, and click **Confirm** to add the tag.

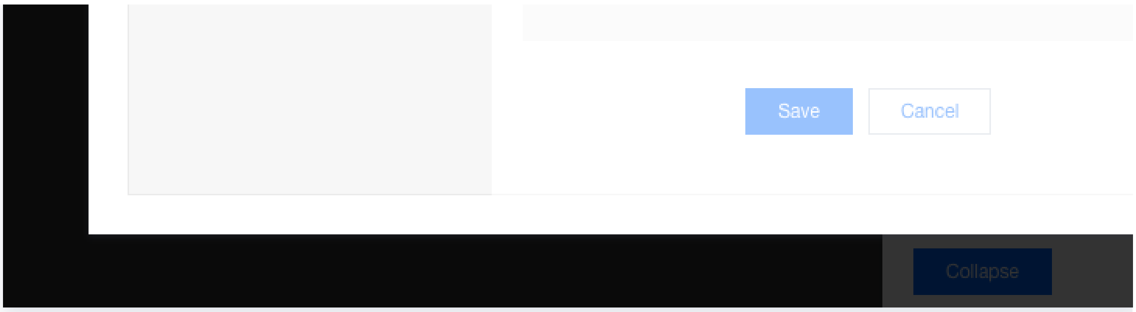


4. Click **Bind Tag Tables** to edit the tag table binding management page.

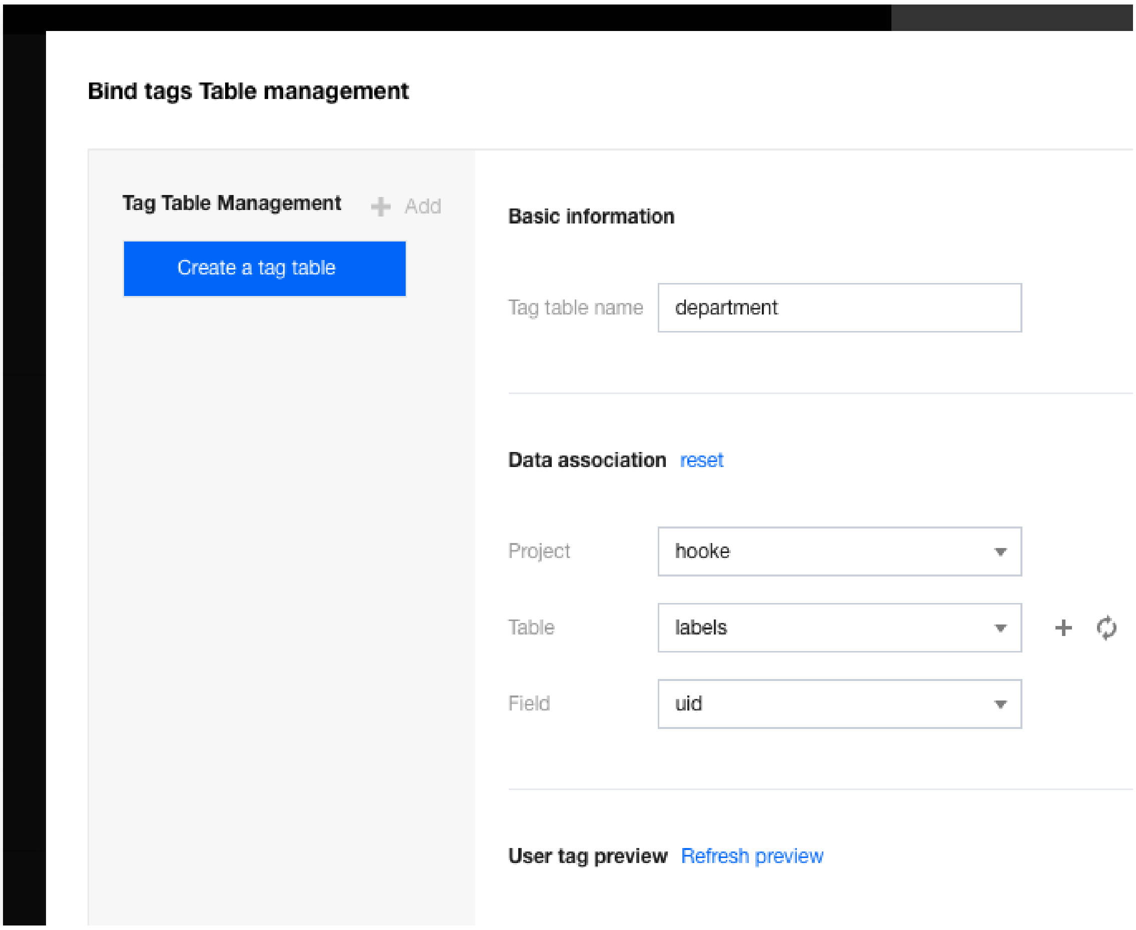


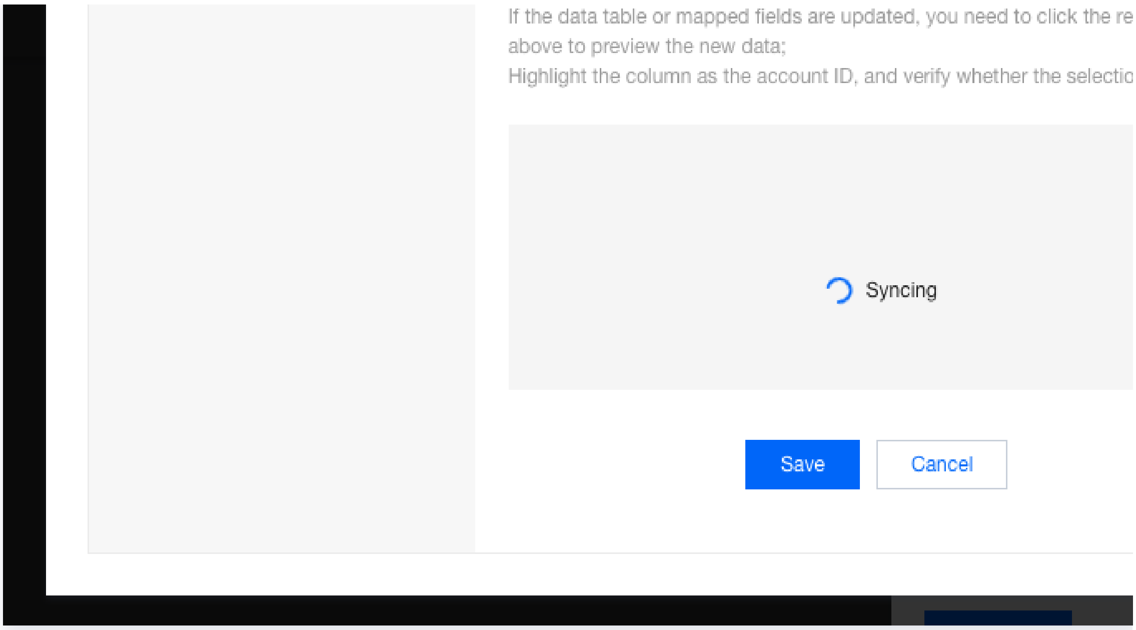
5. Click **Add** to add a tag table.



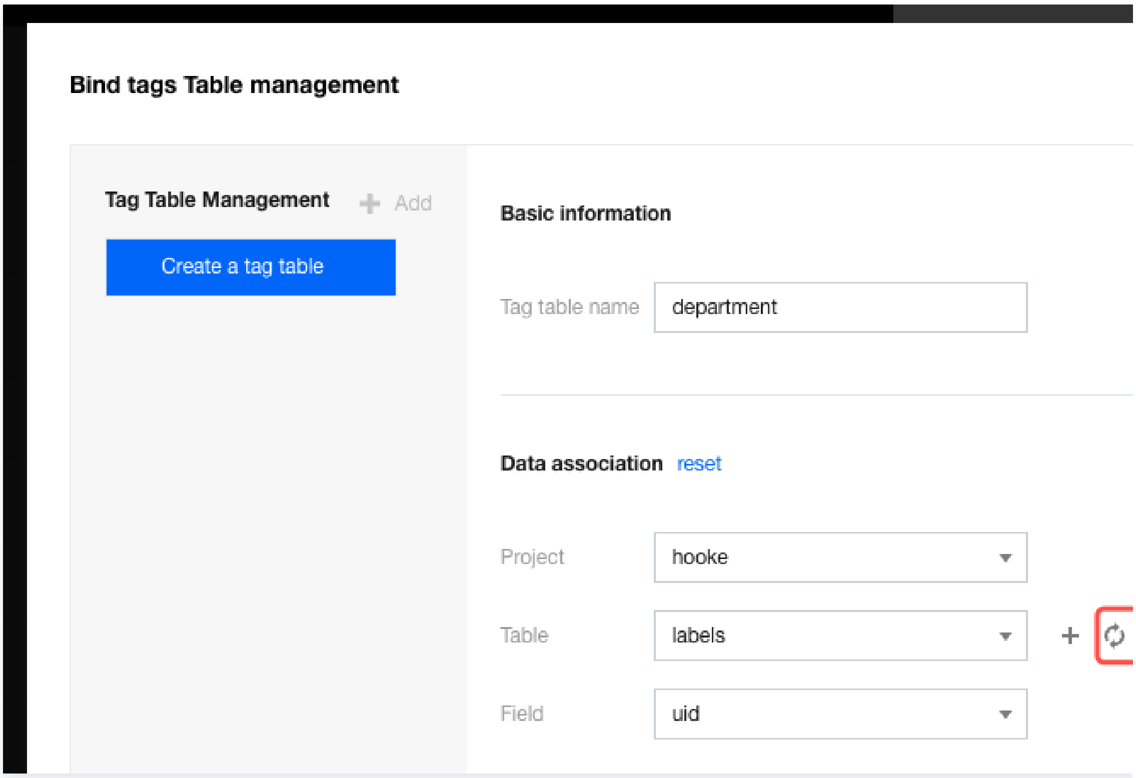


6. Edit the tag table name, and select the project, data table, and field associated with the tag table. The sel ID used in user management to establish a mapping relationship.

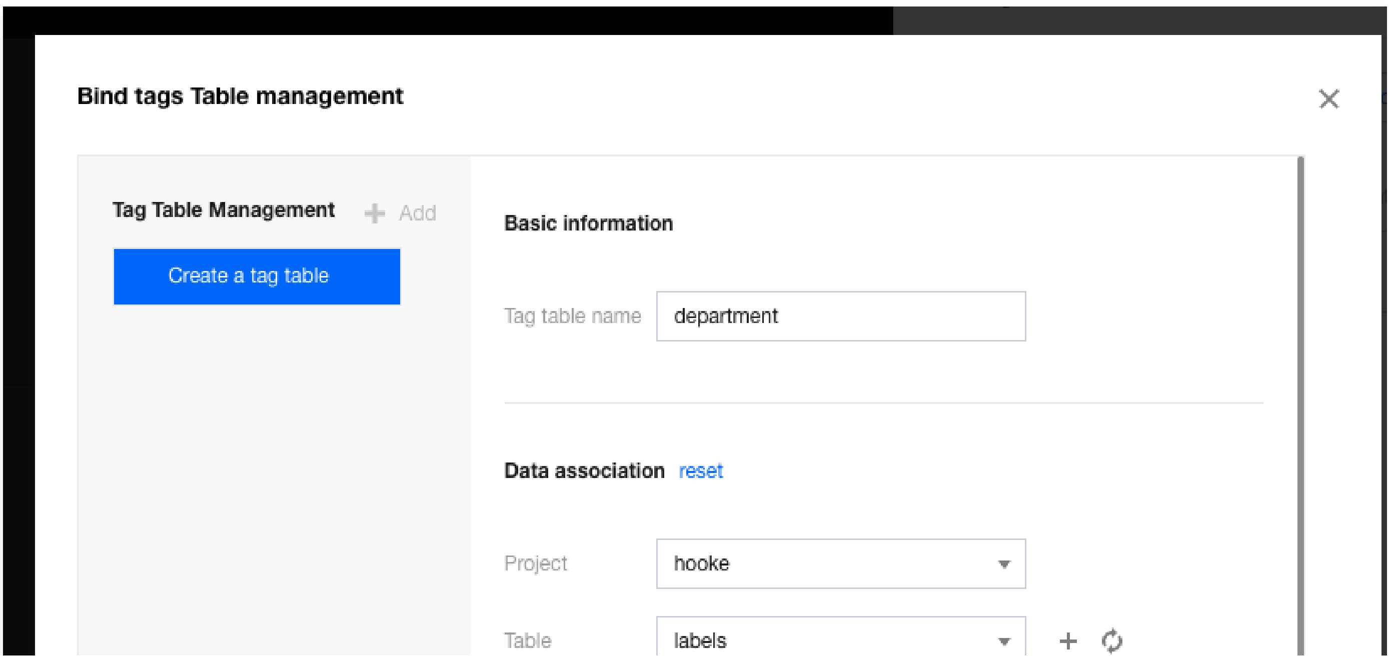


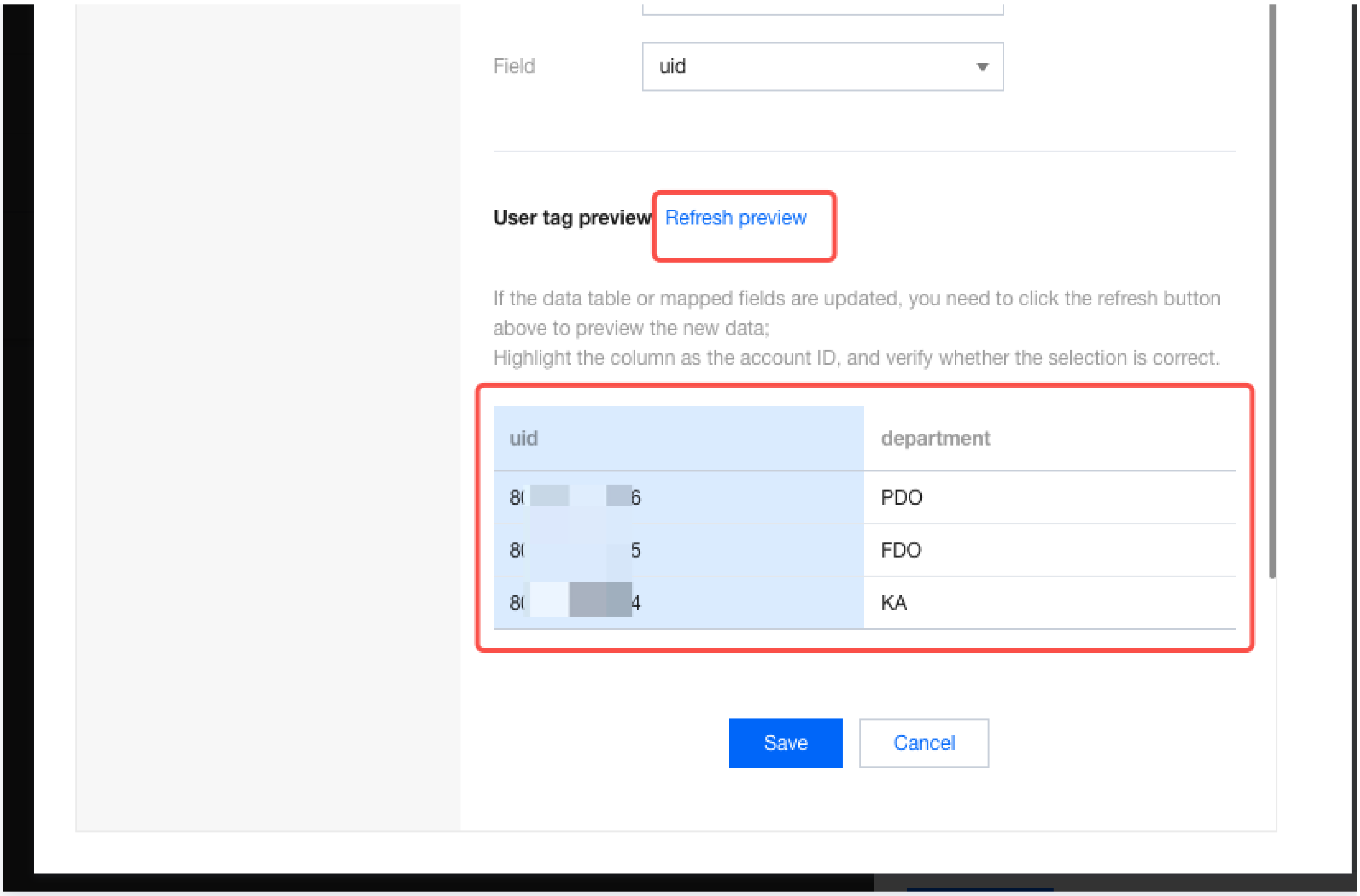


7. If no corresponding data table exists, click + to add a data table, and click  to refresh the data table

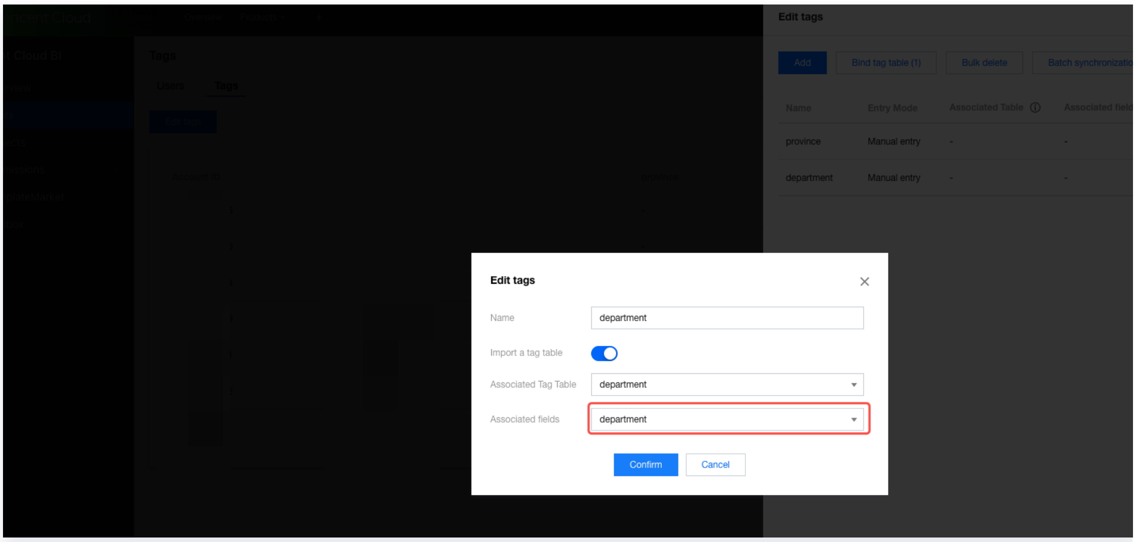


8. The user tag preview displays the matching relationship. Click Refresh Preview to view the first 5 matched rows.

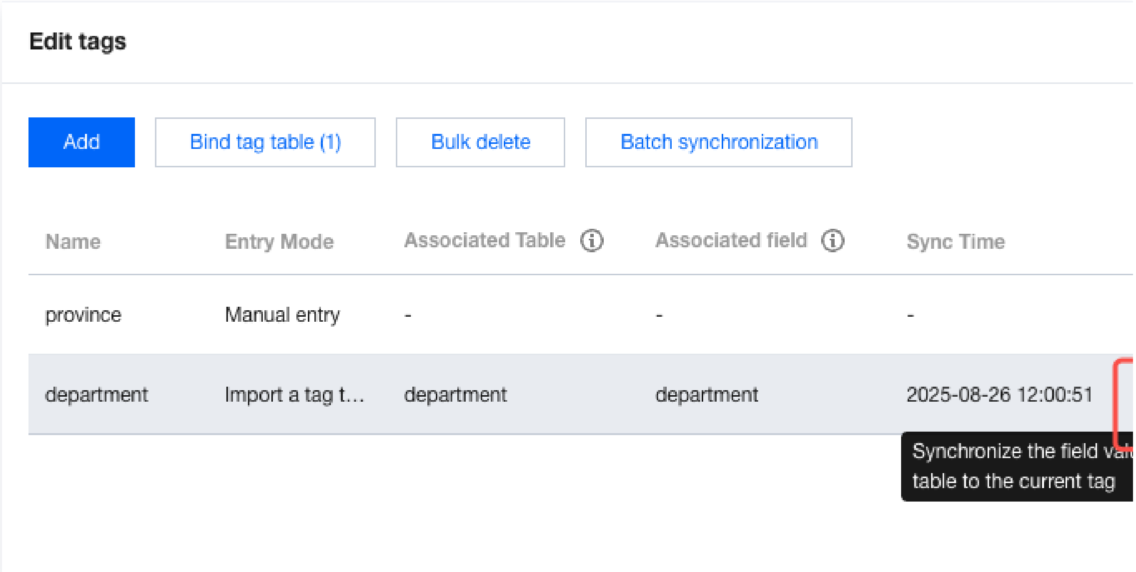


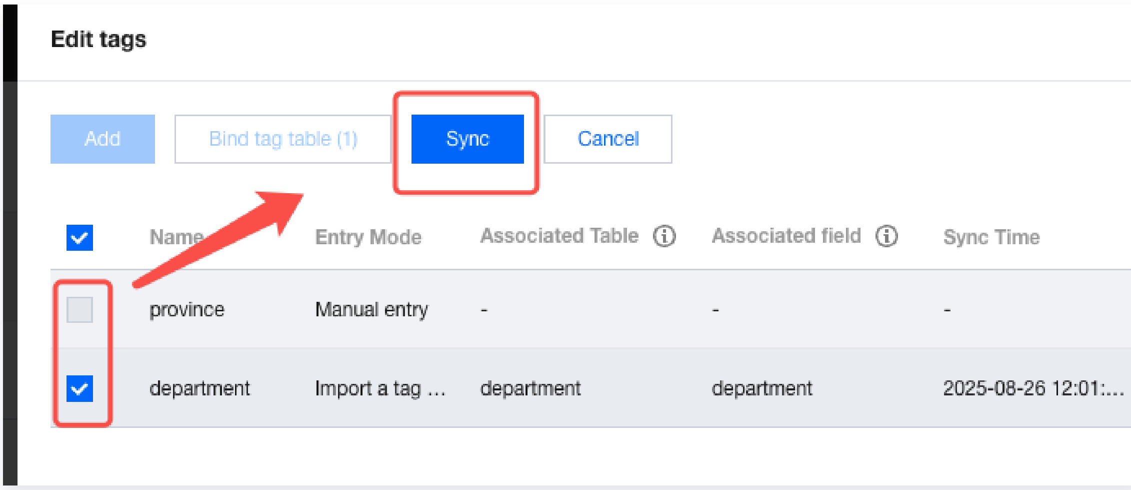


9. The tag editing feature supports importing the tag table to define the tag table and associated fields, esta between tags and tag table fields to facilitate subsequent user-tag matching.



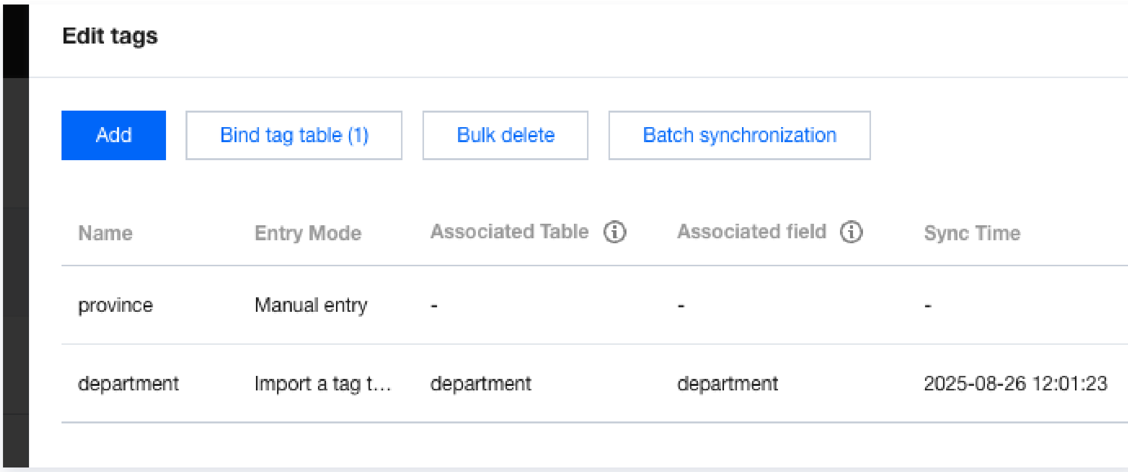
10. The tags in the imported tag table support synchronization. Click to synchronize the tag values. Click **Batc** the imported data table and synchronize them in batches.



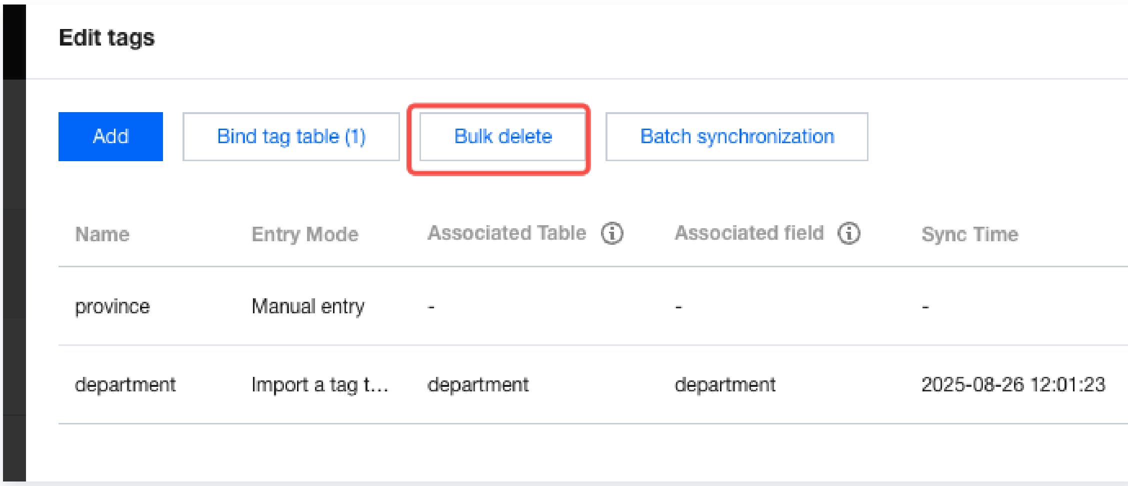


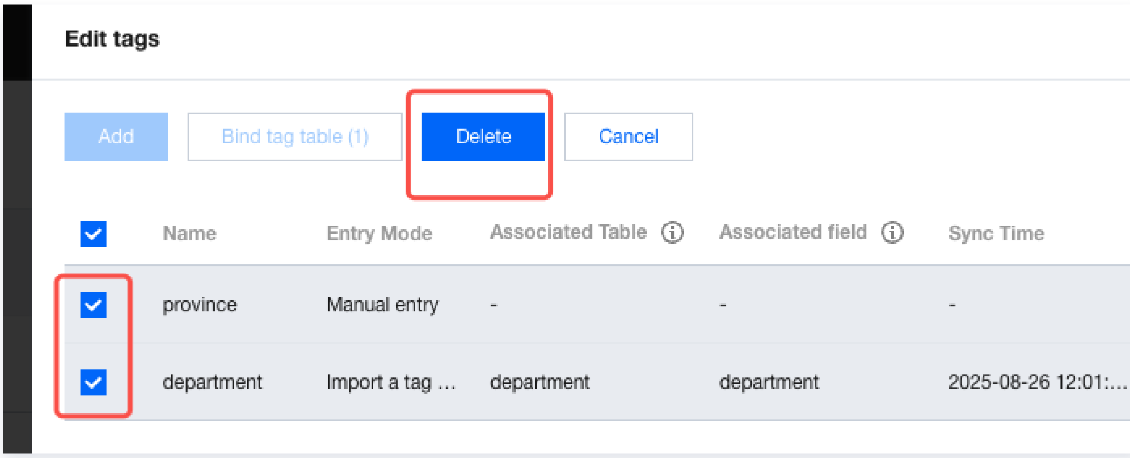
Operation Steps for Deleting Tags

1. In the tag editing drawer, click the Delete button on the right side of the tag to be deleted.



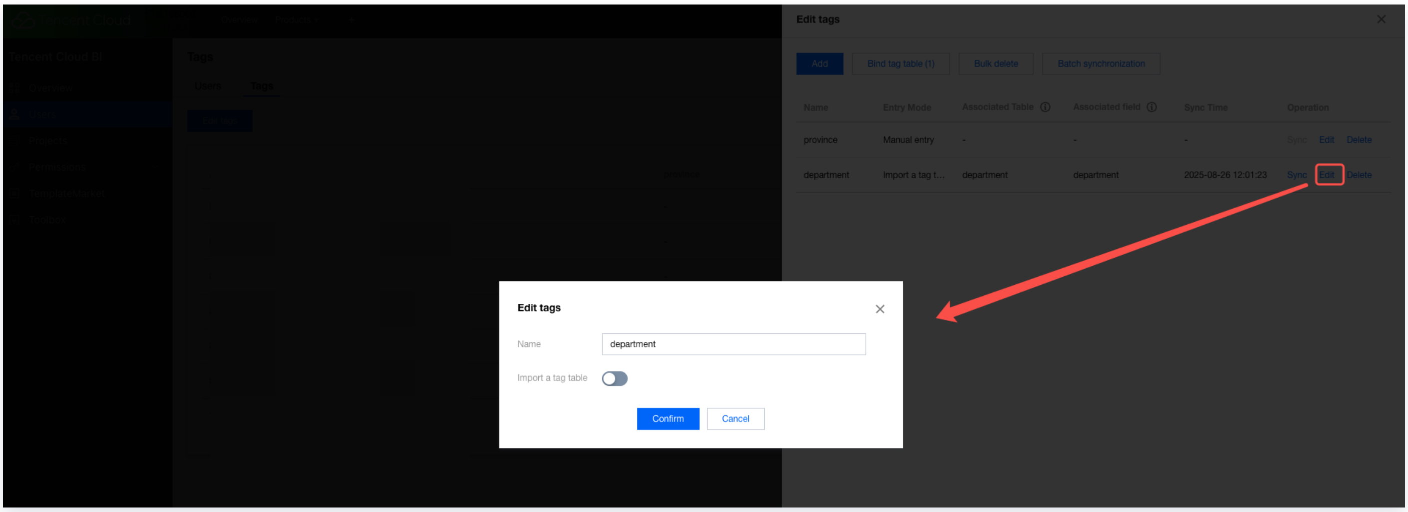
2. In the tag editing drawer, click **Batch Delete**, select the tags to be deleted, and click the **Delete** button.





Operation Steps for Editing Tags

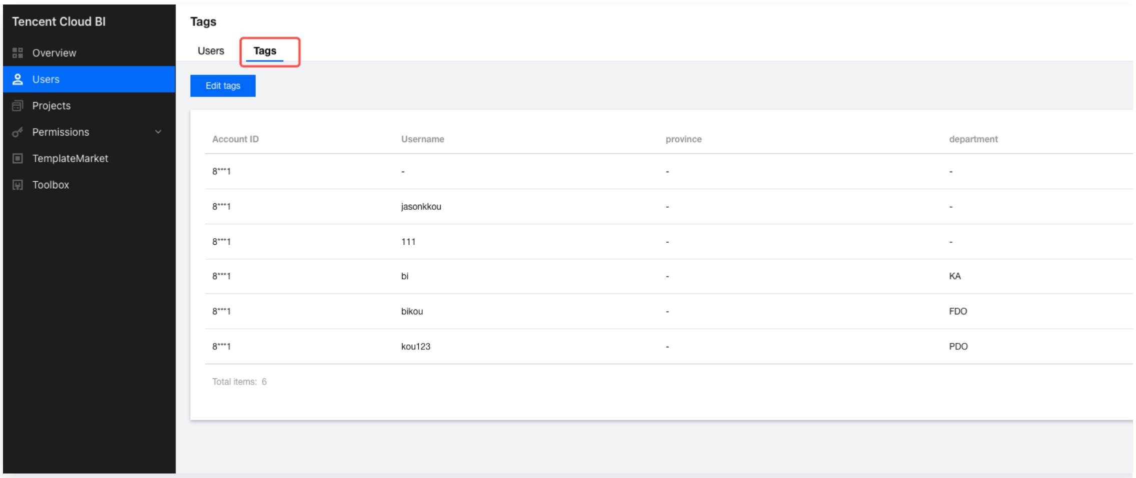
In the tag editing drawer, click the Edit button on the right side of the tag to be edited, and edit the tag name in the pop-up window.



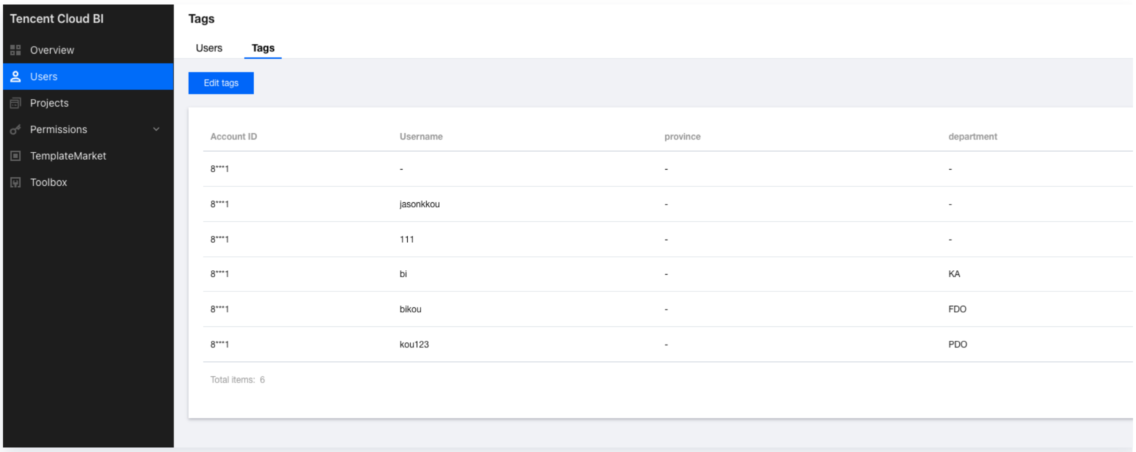
Editing Tag Values

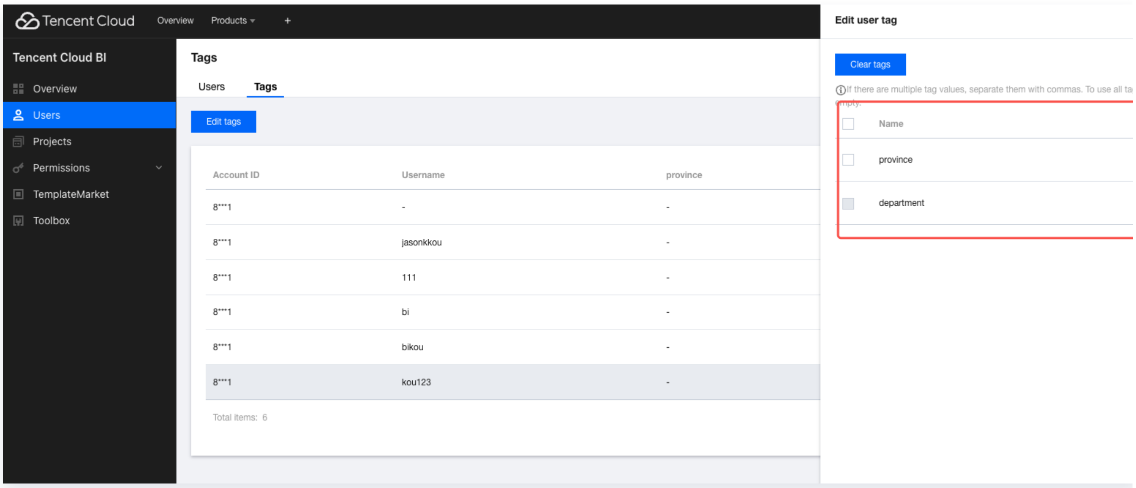
Operation steps for adding tags.

1. Go to the User **Management page** > the **Tag Management** tab.



2. Click the **Edit** button in the operation column on the right side of the user, and a drawer will slide out from





In the drawer, you can edit the tag values for all the tags associated with this user.
When the tag value contains multiple entries, separate the entries with a comma ",". If the tag value represents all values, enter "{*}". If the tag value is empty, leave it blank. Select the tags to be cleared, and click the **Clear Tags** button to remove the tag values of the selected tags. Tags imported into the tag table cannot be edited manually.

Resource Permissions

Data Table Permission Management

Last updated：2025-09-19 15:30:17

Overview

Business Intelligence (BI) enables page-based permission management, allowing different users to have varying permissions for different data.

For example, User A is a data analyst, and User B is an operator. Through resource permissions, you can configure that User A can access and edit data source 1, data table 1, and the dictionary table, and User B can access data table 1 and the dictionary table.

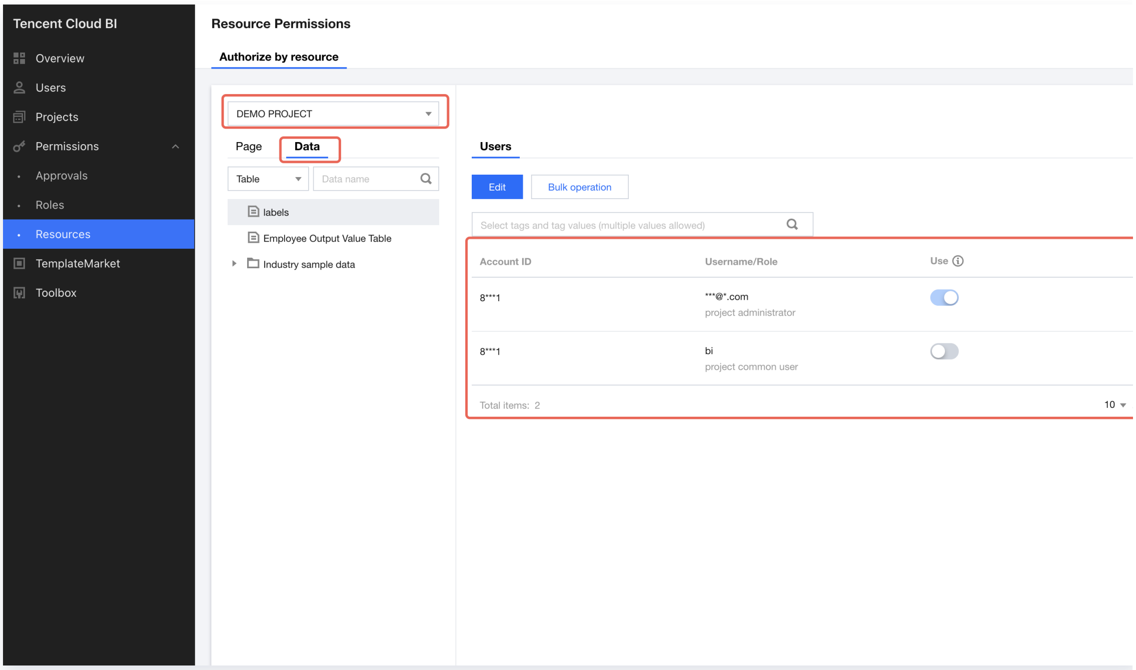
Feature limits: This feature is only available to Basic Edition and Professional Edition users.

Operation Steps

Permission role limits: Only the "enterprise administrator", "enterprise permission administrator", and "project administrator" roles are allowed to access.

Resource Authorization Operation

1. Enter **Permission Management** > **Permissions for Resources** > **Authorization by resource**.

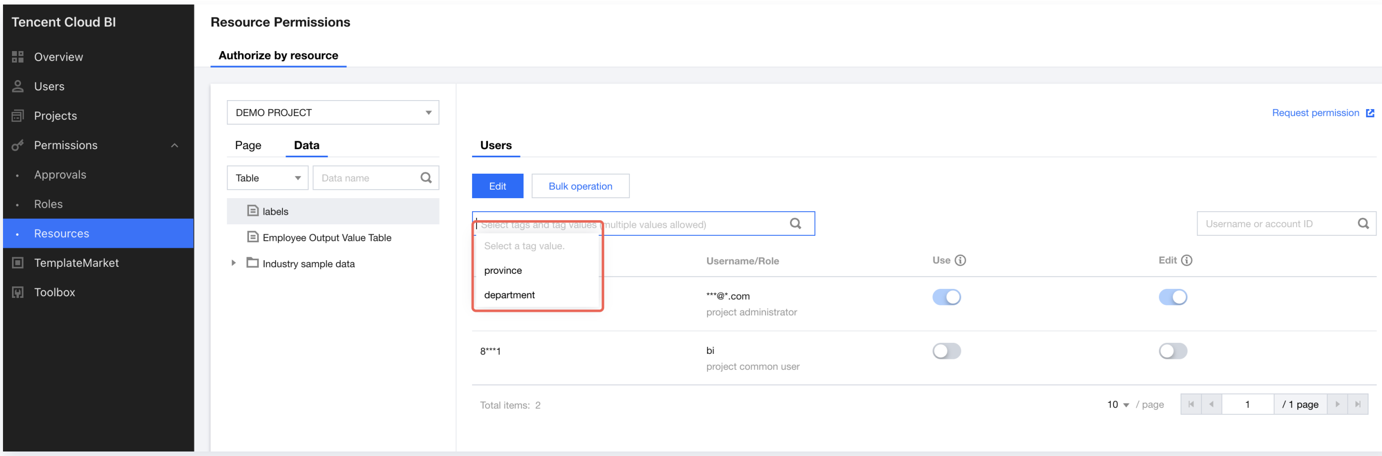


2. Select **Data List** > **Select Data Table** > **User** > **Edit**.

   If the user's global role is "enterprise administrator" or "enterprise permission administrator", the data list drop-down list options will consist of all data tables, dictionary tables, and data sources.

   If the user's global role is not "enterprise administrator" or "enterprise permission administrator", the data list drop-down list options will be limited to the data tables, dictionary tables, and data sources within the corresponding projects where the user is the "project administrator".

   Support filtering users based on the tag values configured in Tag Management.



3. Enable and disable permissions for users.

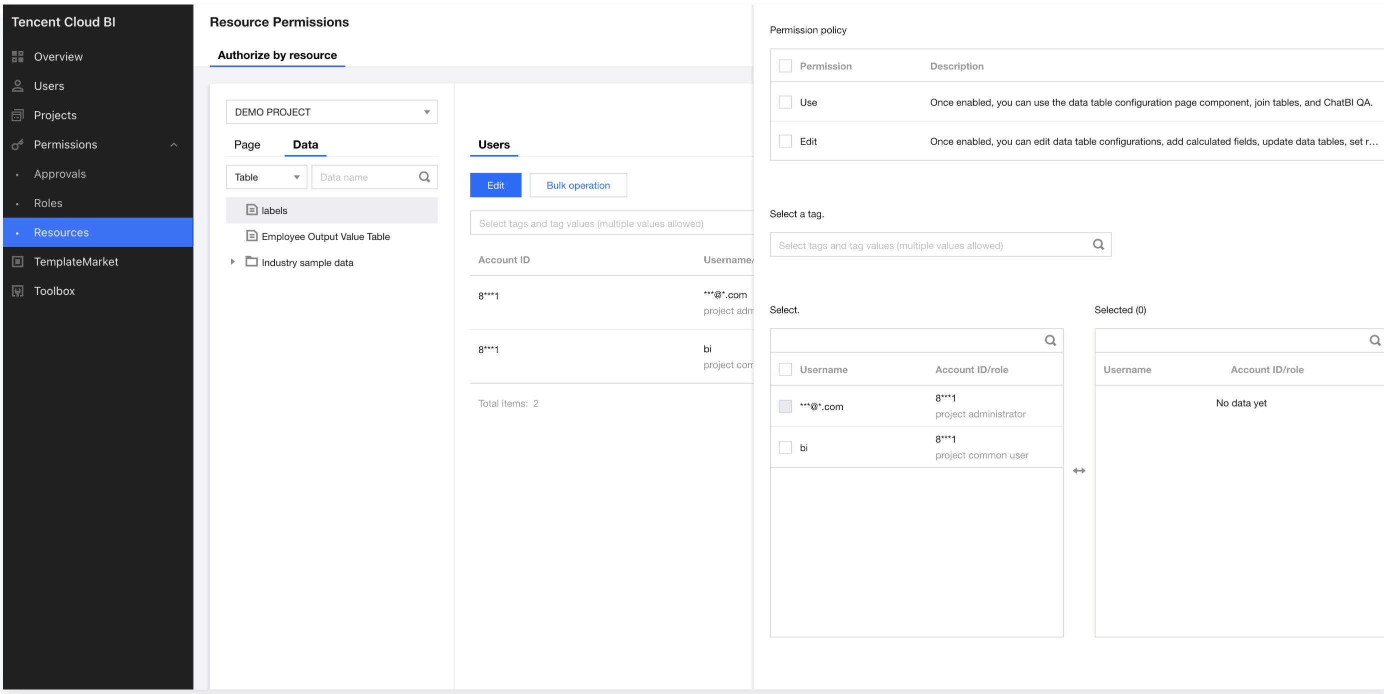
   Usage permission: When the usage permission is enabled, the user can view and select the data in the component's data configurations. If the usage permission for a data table/dictionary table/data source is disabled, the user will still be able to view the data in the component, but will not be able to select or use the data.
   Edit permission: When the edit permission is enabled, the user can perform operations on the corresponding data tables/dictionary tables/data sources in the project management/data list, including viewing, editing, updating, and deleting, as well as row/column level permissions. If the edit permission for a data table/dictionary table/data source is disabled, the user will not be able to perform these operations.
4. Default role permissions and applicable scope.

   (1) Enterprise administrators and project administrators have all permissions enabled, and these permissions cannot be disabled.
   (2) Project viewers have the edit permission disabled for all data, and the edit permission cannot be enabled.
   (3) When a member is added to the project, the default permissions are assigned based on the role of that member.
      A. Project editor: By default, the usage permission is enabled and cannot be disabled. The edit permission is disabled by default, but can be authorized to enable.
      B. Project viewer: By default, the usage and edit permissions are disabled and cannot be enabled.
      C. Project general member: By default, all permissions are disabled and can be toggled on or off.
   (4) When the user role is successfully modified, the system will automatically update the member's permissions based on the new role.

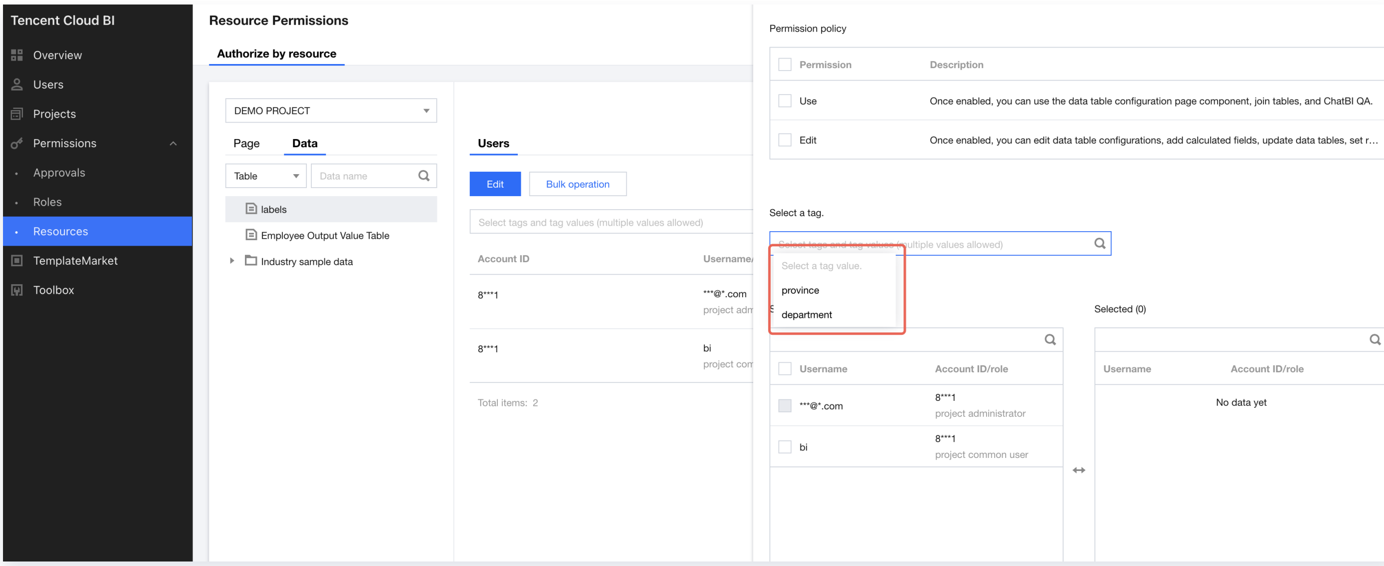
A. Any role changed to enterprise administrator or project administrator will have all permissions enabled, and these permissions cannot be disabled.
B. When modifying between other project roles, the permissions for the modified role will be updated based on the default permission settings as defined in section 4.(3).
Project regular users can apply for permissions, and after approval, the corresponding permissions for the relevant pages will be enabled.

5. Batch operations.

Click **Batch Operation**, and a drawer will slide out from the right. Select the permissions and the corresponding usernames.
The user roles follow the requirements in section 4. If the role does not support adding permissions, the checkbox will be disabled.

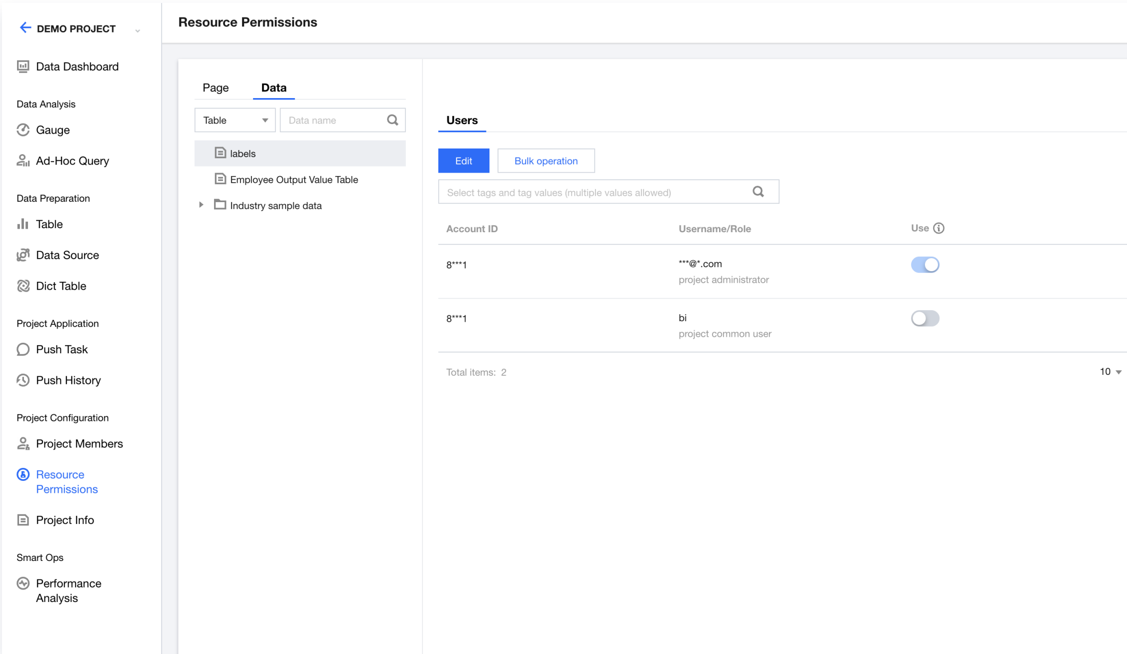


Support filtering users based on the tag values configured in Tag Management, and assigning permissions in batches according to the filtered list.



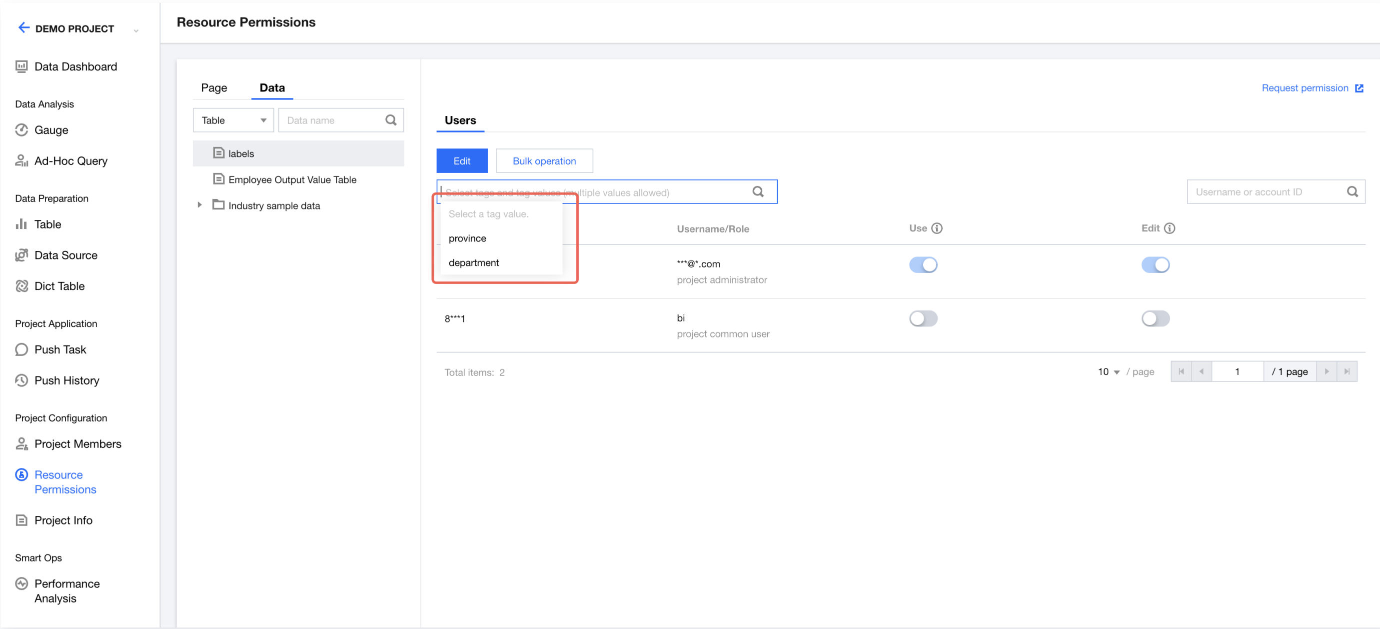
Project Management Permission Operations

1. Enter **Project Management** > **Specific Project** > **Permissions for Resources.**



2. Select the **data list** > **select the data table** > **the User tab** > **Edit**.

If the user's global role is "enterprise administrator" or "enterprise permission administrator", the data list drop-down list options will consist of all data tables, dictionary tables, and data sources.
If the user's global role is not "enterprise administrator" or "enterprise permission administrator", the data list drop-down list options will be limited to the data tables, dictionary tables, and data sources within the corresponding projects where the user is the "project administrator".
Support filtering users based on the tag values configured in Tag Management.



3. Enable and disable permissions for users.

   Usage permission: When the usage permission is enabled, the user can view and select the data in the component's data configurations. If the usage permission for a data table/dictionary table/data source is disabled, the user will still be able to view the data in the component, but will not be able to select or use the data.
   Edit permission: When the edit permission is enabled, the user can perform operations on the corresponding data tables/dictionary tables/data sources in the project management/data list, including viewing, editing, updating, and deleting, as well as row/column level permissions. If the edit permission for a data table/dictionary table/data source is disabled, the user will not be able to perform these operations.
4. Default role permissions and applicable scope.

   (1) Enterprise administrators and project administrators have all permissions enabled, and these permissions cannot be disabled.
   (2) Project viewers have the edit permission disabled for all data, and the edit permission cannot be enabled.
   (3) When a member is added to the project, the default permissions are assigned based on the role of that member.

      A. Project editor: By default, the usage permission is enabled and cannot be disabled. The edit permission is disabled by default, but can be authorized to enable.

B. Project viewer: By default, the usage and edit permissions are disabled and cannot be enabled.

C. Project general member: By default, all permissions are disabled and can be toggled on or off.

(4) When the user role is successfully modified, the system will automatically update the member's permissions based on the new role.

A. Any role changed to enterprise administrator or project administrator will have all permissions enabled, and these permissions cannot be disabled.

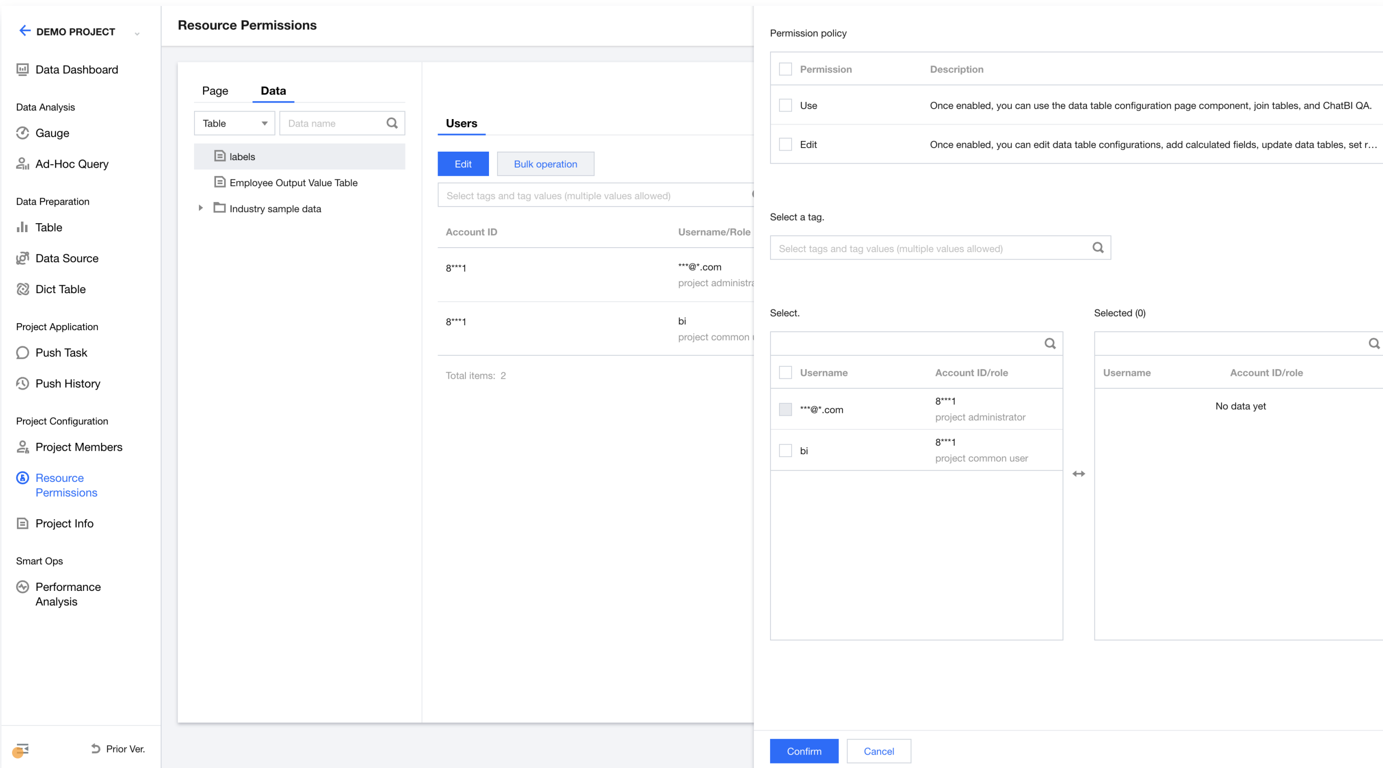
B. When modifying between other project roles, the permissions for the modified role will be updated based on the default permission settings as defined in section 4.(3).

Project regular users can apply for permissions, and after approval, the corresponding permissions for the relevant pages will be enabled.

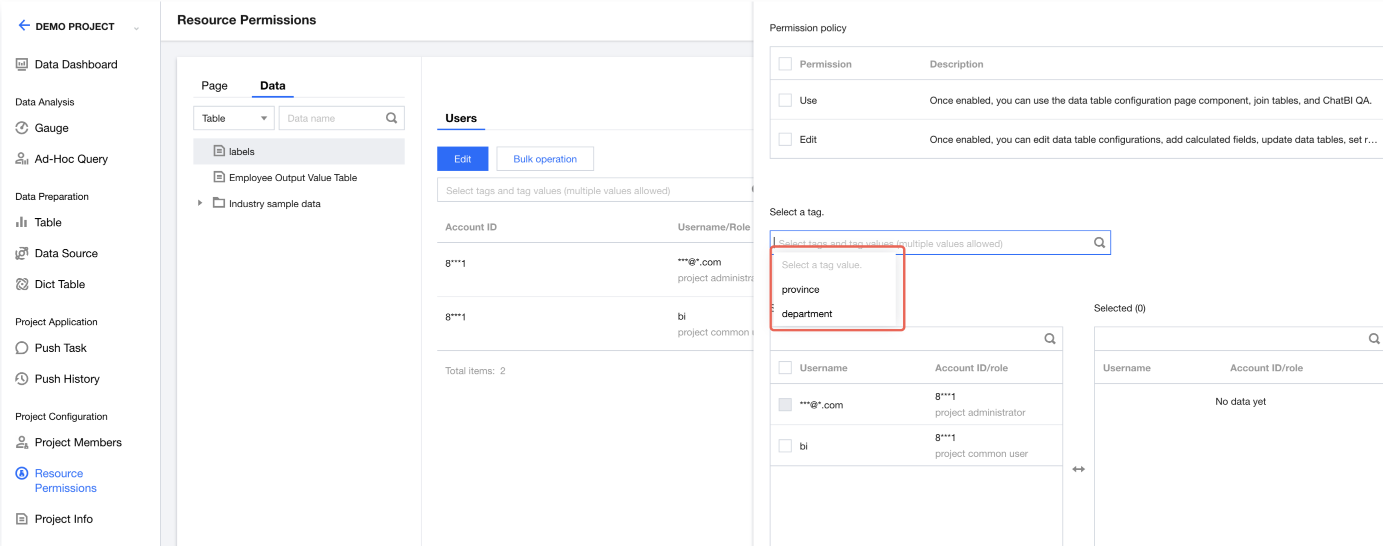
5. Batch operations.

Click **Batch Operation**, and a drawer will slide out from the right. Select the permissions and the corresponding usernames.

The user roles follow the requirements in section 4. If the role does not support adding permissions, the checkbox will be disabled.



Support filtering users based on the tag values configured in Tag Management, and assigning permissions in batches according to the filtered list.



Report Permission Management

Last updated：2025-09-19 15:30:17

Through the page-based permission management in Business Intelligence (BI), different users can have different permissions for different pages.
For example, User A is the company's general manager, User B is the regional manager for Beijing, and User C is the regional manager for Shanghai. Through resource permissions, you can configure that User A can view and share page 1, User B can view page 1, and User C can view and edit page 1.

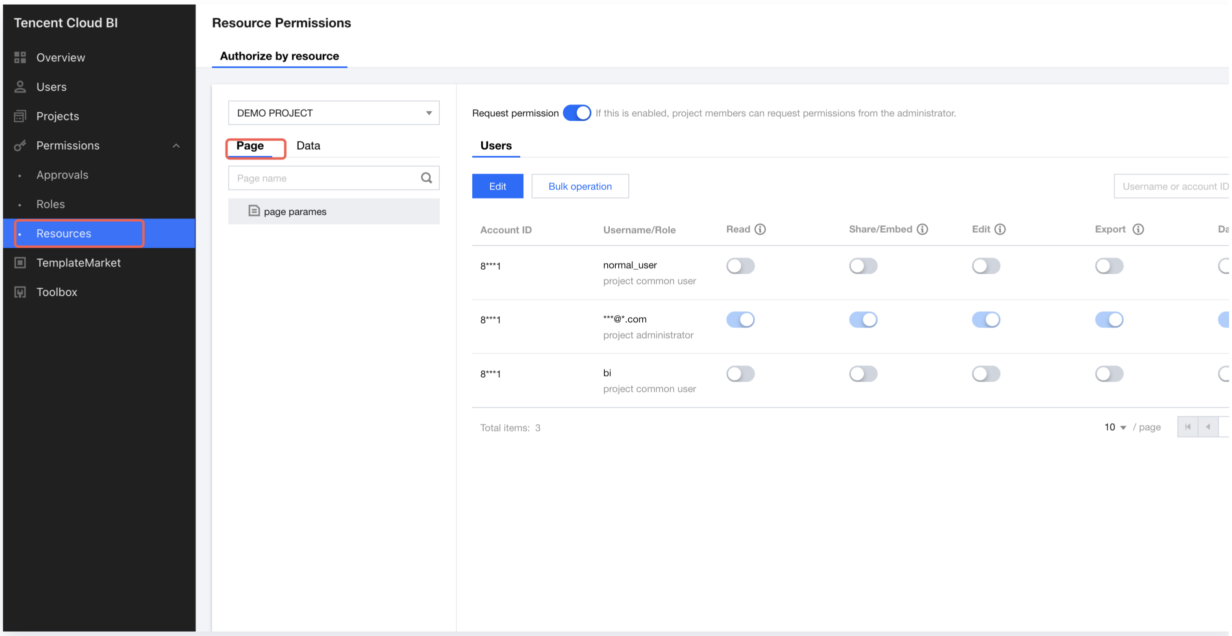
Edition limits: This feature is only available to Basic Edition and Professional Edition users.

Operation Steps

Permission role limits: Only the "enterprise administrator", "enterprise permission administrator", and "project administrator" roles are allowed to access.

Resource-based Authorization

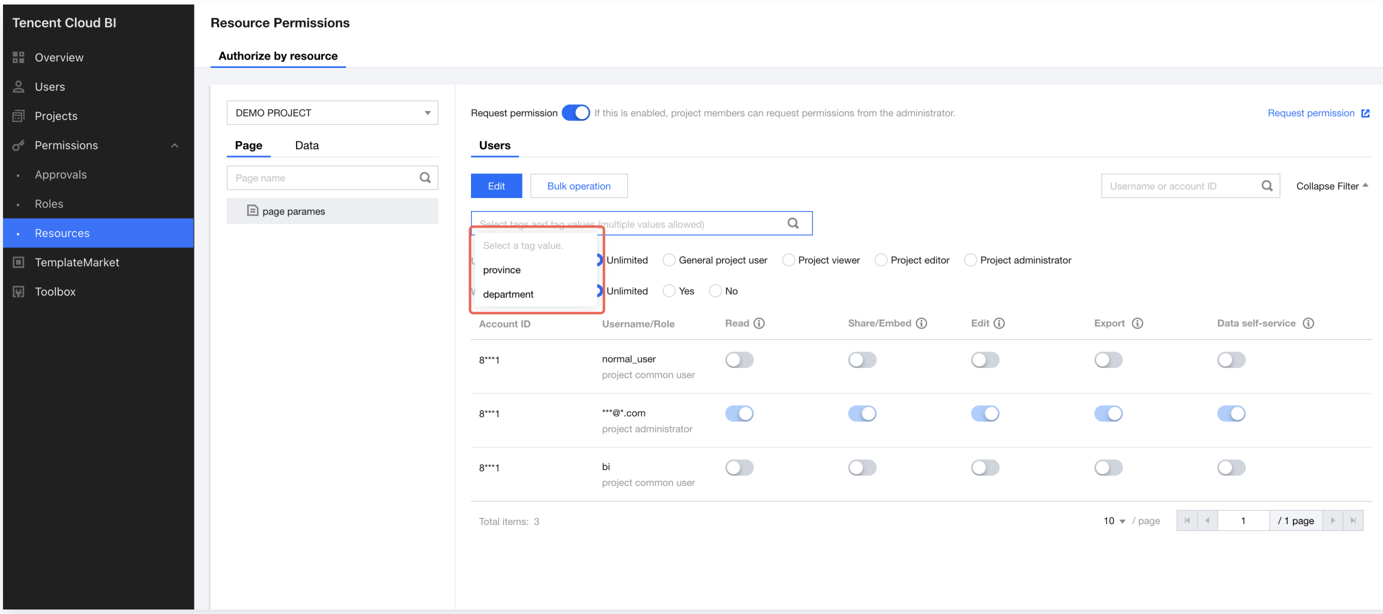
1. Enter the **permission management page** > **resource permission** > **resource-based authorization.**



2. Select project list > Select page > User > **Edit.**

   If the user's global role is "enterprise administrator" or "enterprise permission administrator", the project list drop-down list options will consist of all projects.

If the user's global role is not "enterprise administrator" or "enterprise permission administrator", the project list drop-down list options will be limited to the corresponding projects where the user is the "project administrator".
Support filtering users based on the tag values configured in Tag Management



.

3. Enable and disable permissions for users.
   - View permission: When the view permission is enabled, the user can view the page content on the dashboard of the project. Disabling the view permission for a page will automatically disable the share/embed/download and edit permissions of the same page.
   - Share/embed: When the share/embed permissions are enabled, the user will see the relevant buttons for sharing and embedding on the page dashboard within the project. Enabling the share/embed permissions for a page will automatically enable the view permission for that page.
   - Edit permission: When the edit permission is enabled, the user will see the edit and decommission buttons on the page dashboard within the project, and the edit, copy, and delete buttons will be available in the page list. Enabling the edit permission for a page will automatically enable the view permission for that page.
   - Self-service data retrieval: When the self-service data retrieval permission is enabled, the user can download the data content supported by the self-service data retrieval component on the page dashboard within the project. Enabling self-service data retrieval for a page will automatically enable the view permission for that page.
4. Default role permissions and applicable scope.

4.1 Enterprise administrators and project administrators have all permissions enabled, and these permissions cannot be disabled.

4.2 Project viewers have the edit permission disabled for all pages, and the edit permission cannot be enabled.

4.3 When a member is added to the project, the default permissions are assigned based on the role of that member.

a. Project editor: By default, all permissions for all pages within the current project are enabled.

b. Project viewer: By default, the view permission for all pages within the current project is enabled, while the share/embed and edit permissions are disabled.

c. Project general member: By default, all permissions are disabled.

4.4 When the user role is successfully modified, the system will automatically update the member's permissions based on the new role.

a. Any role changed to enterprise administrator or project administrator will have all permissions enabled, and these permissions cannot be disabled.

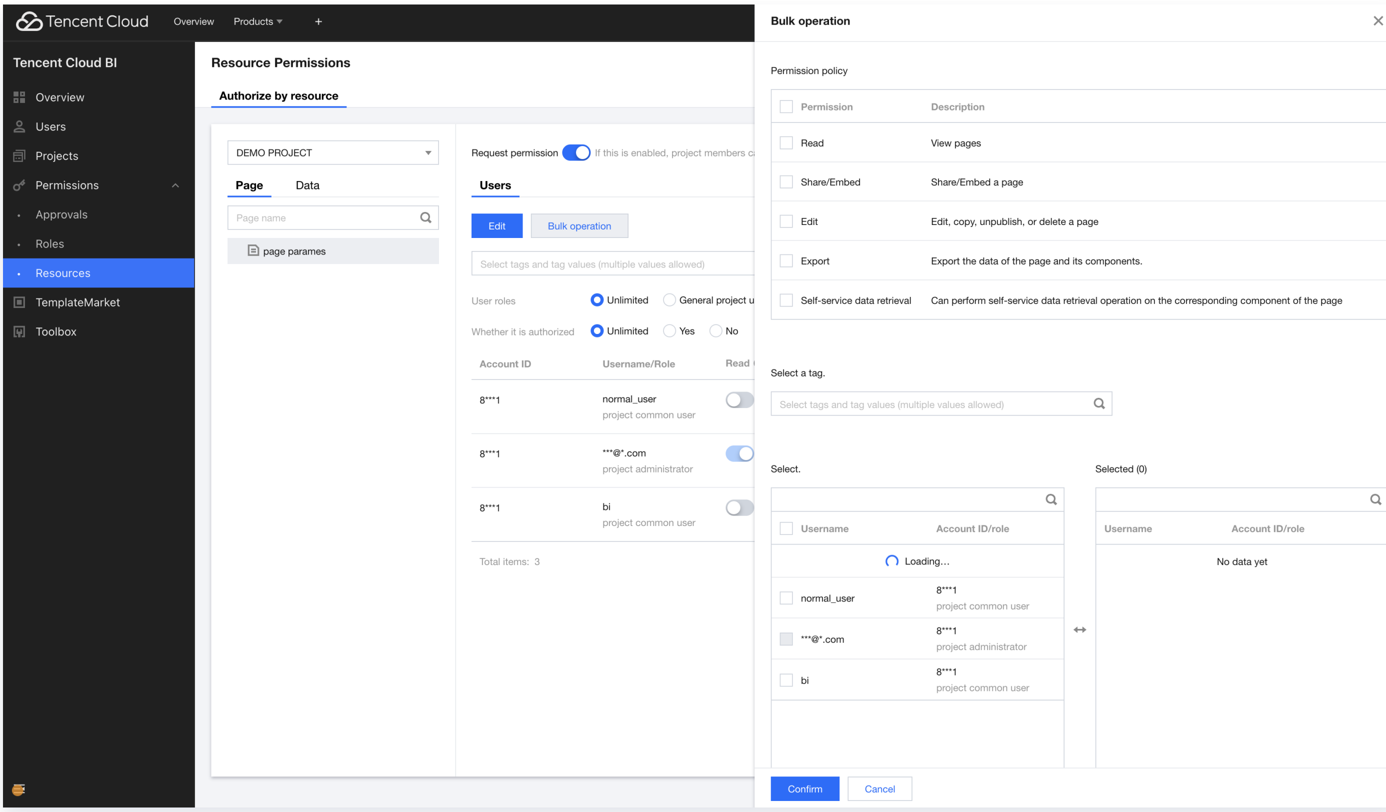
b. When modifying between other project roles, the permissions for the modified role will be updated based on the default permission settings as defined in section 3.

Project regular users can apply for permissions, and after approval, the corresponding permissions for the relevant pages will be enabled.

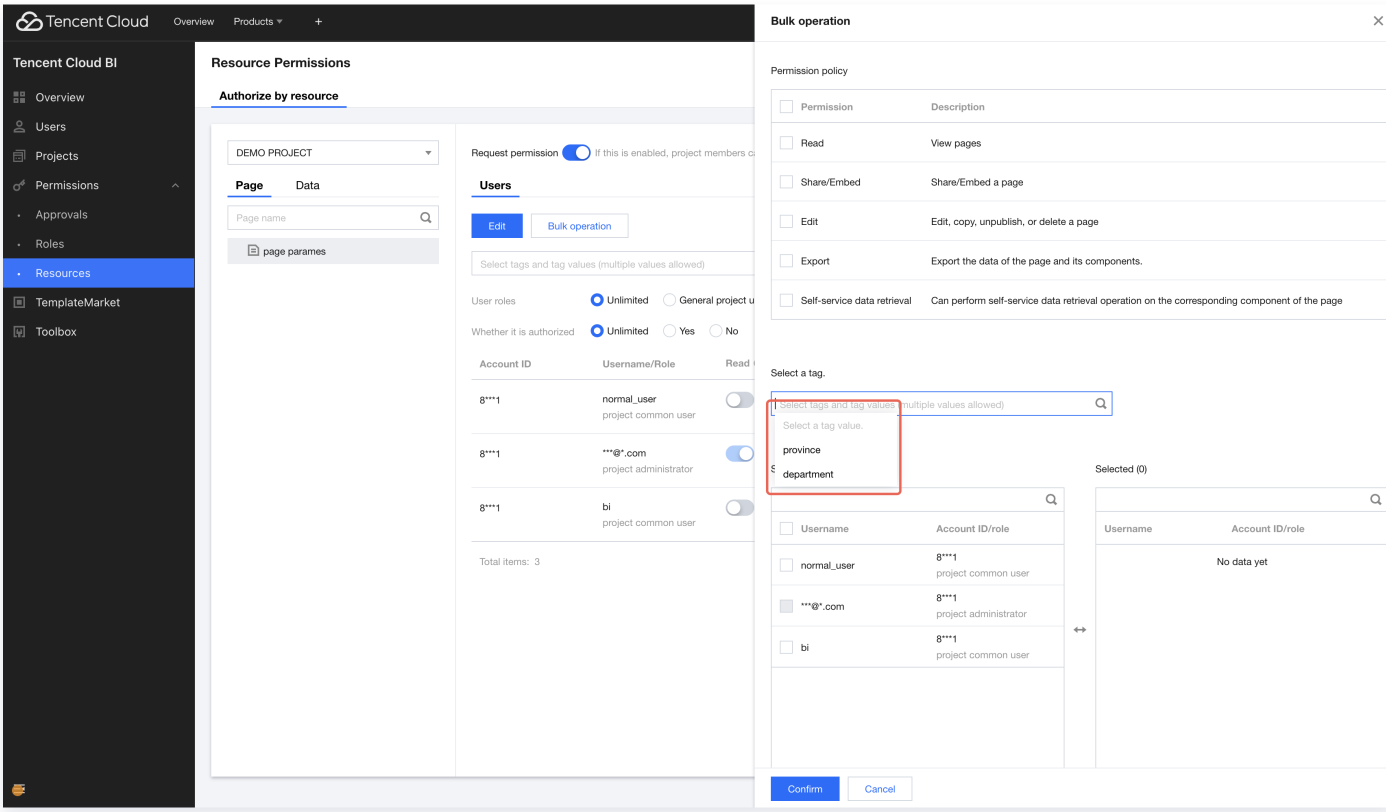
5. Batch operations.

Click **Batch Operation**, and a drawer will slide out from the right. Select the permissions and the corresponding usernames.

The user roles follow the requirements in section 4. If the role does not support adding permissions, the checkbox will be disabled.

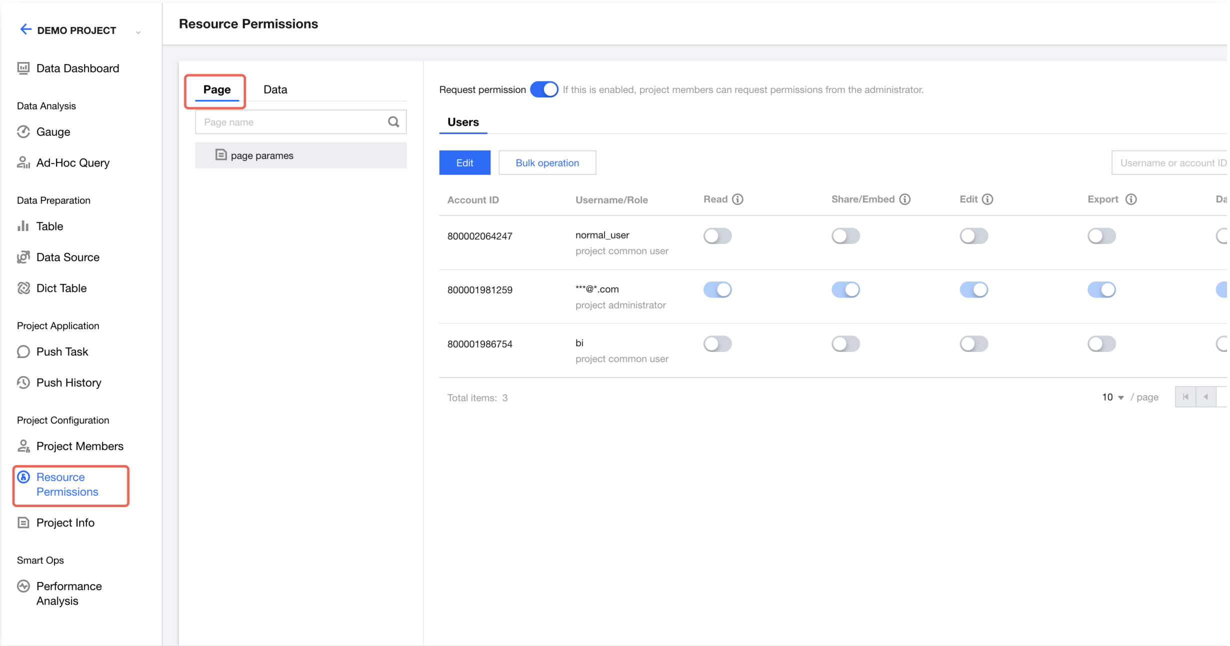


Support filtering users based on the tag values configured in Tag Management, and assigning permissions in batches according to the filtered list.



Authorization of Project Management Permissions

1. Go to **Project Management** > select a specific project > **resource permission**



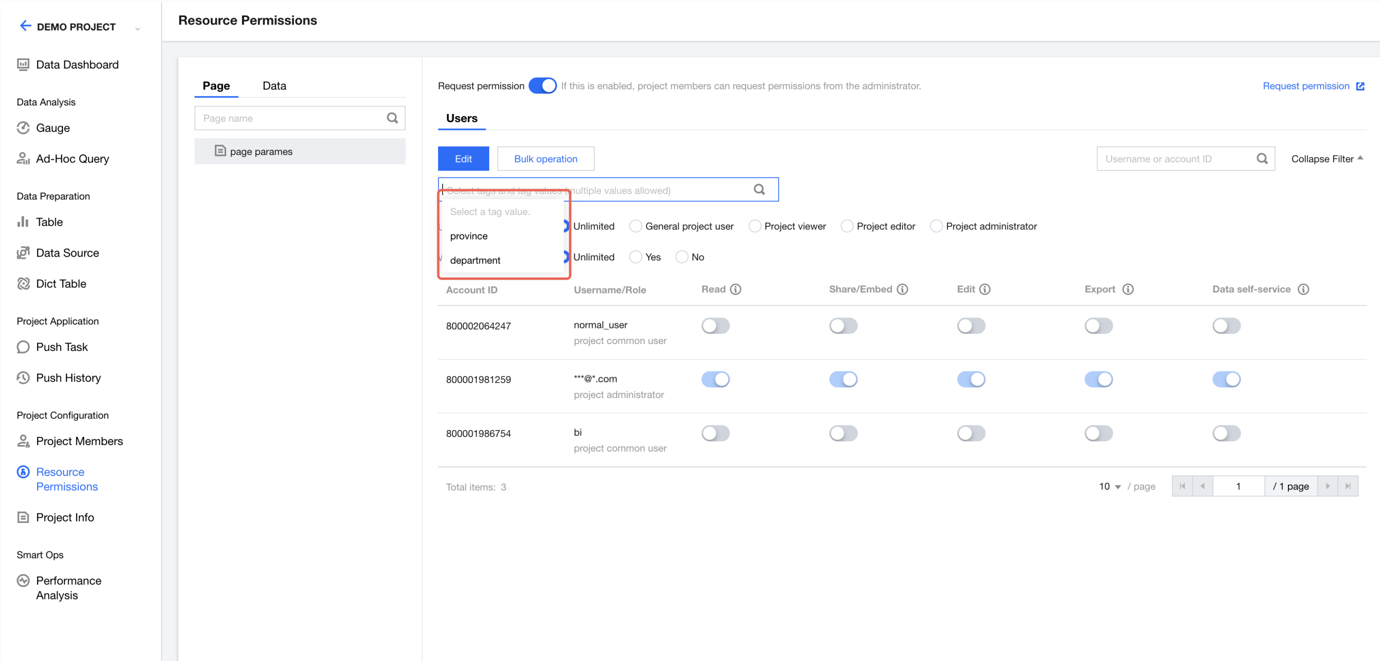
.

2. **Select page** > **User Tab** > **Edit.**

   If the user's global role is "enterprise administrator" or "enterprise permission administrator", the project list drop-down list options will consist of all projects.

   If the user's global role is not "enterprise administrator" or "enterprise permission administrator", the project list drop-down list options will be limited to the corresponding projects where the user is the "project administrator".

Support filtering users based on the tag values configured in Tag Management



.

3. Enable and disable permissions for users.
   - View permission: When the view permission is enabled, the user can view the page content on the dashboard of the project. Disabling the view permission for a page will automatically disable the share/embed/download and edit permissions of the same page.
   - Share/embed: When the share/embed permissions are enabled, the user will see the relevant buttons for sharing and embedding on the page dashboard within the project. Enabling the share/embed permissions for a page will automatically enable the view permission for that page.
   - Edit permission: When the edit permission is enabled, the user will see the edit and decommission buttons on the page dashboard within the project, and the edit, copy, and delete buttons will be available in the page list. Enabling the edit permission for a page will automatically enable the view permission for that page.
   - Self-service data retrieval: When the self-service data retrieval permission is enabled, the user can download the data content supported by the self-service data retrieval component on the page dashboard within the project. Enabling self-service data retrieval for a page will automatically enable the view permission for that page.
4. Default role permissions and applicable scope.

   4.1 Enterprise administrators and project administrators have all permissions enabled, and these permissions cannot be disabled.

4.2 Project viewers have the edit permission disabled for all pages, and the edit permission cannot be enabled.

4.3 When a member is added to the project, the default permissions are assigned based on the role of that member.

a. Project editor: By default, all permissions for all pages within the current project are enabled and cannot be disabled.

b. Project viewer: By default, the view permission for all pages within the current project is enabled, while the share/embed permissions, edit permission, and self-service data retrieval are disabled. However, the share/embed permissions and self-service data retrieval can be toggled on or off.

c. Project general member: By default, all permissions are disabled and can be toggled on or off.

4.4 When the user role is successfully modified, the system will automatically update the member's permissions based on the new role.

a. Any role changed to enterprise administrator or project administrator will have all permissions enabled, and these permissions cannot be disabled.

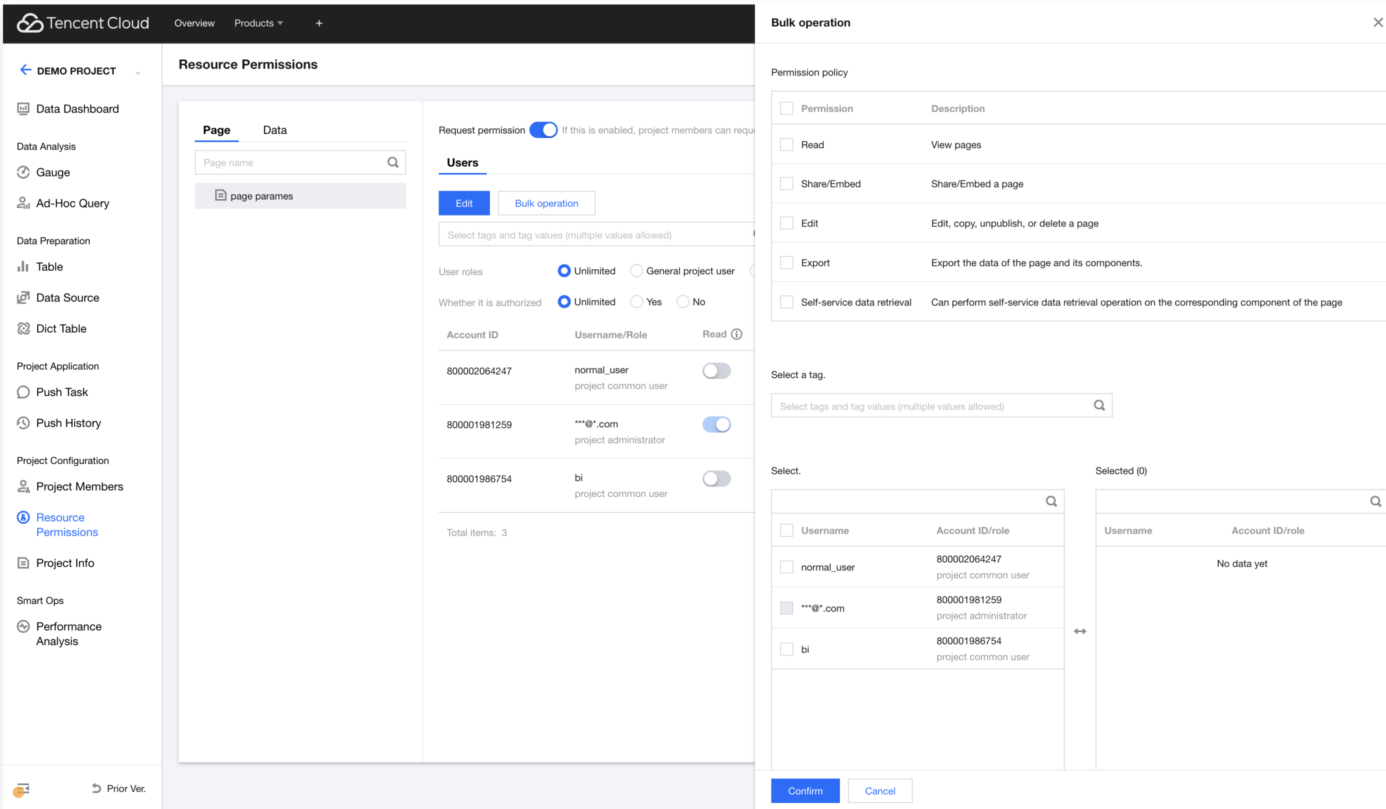
b. When modifying between other project roles, the permissions for the modified role will be updated based on the default permission settings as defined in section 4.3.

Project regular users can apply for permissions, and after approval, the corresponding permissions for the relevant pages will be enabled.

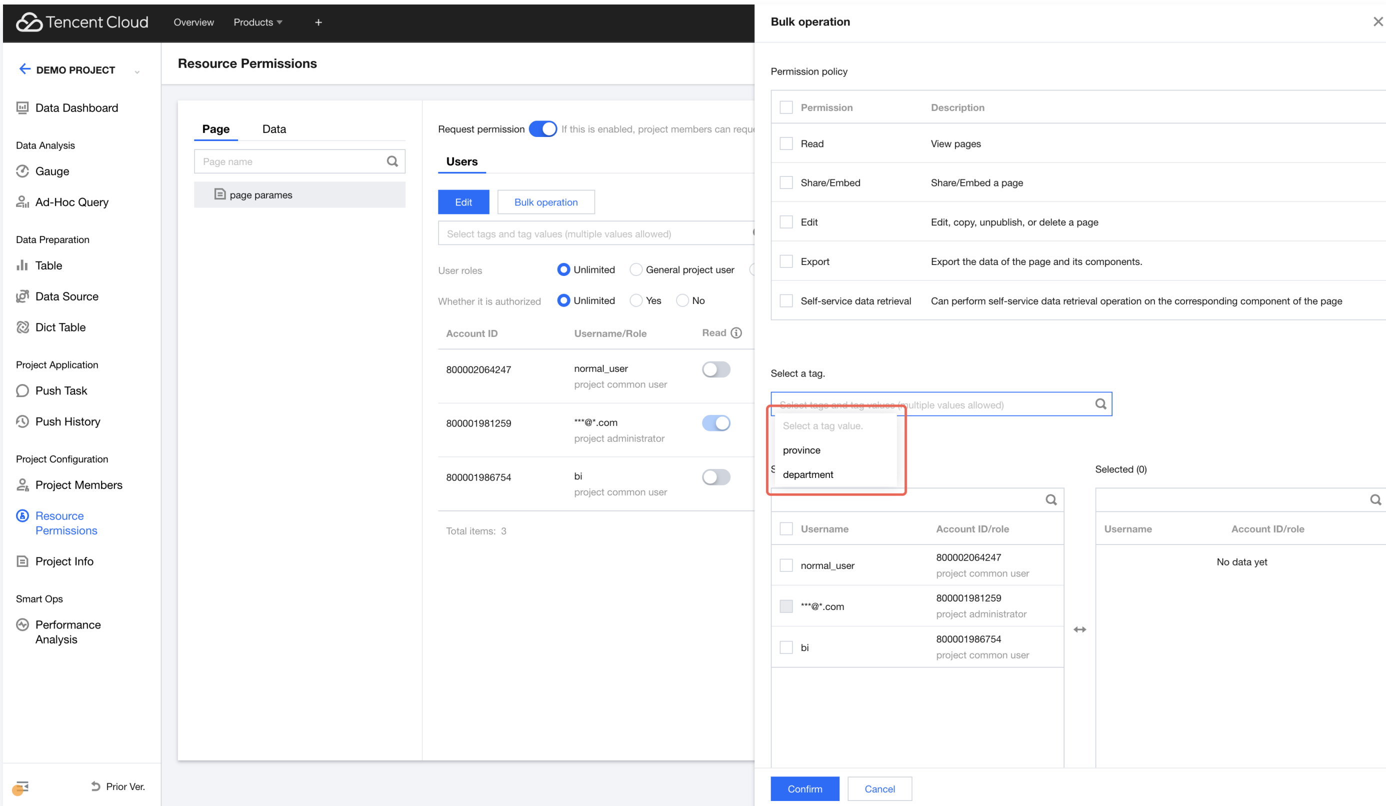
5. Batch operations.

Click Batch Operation, and a drawer will slide out from the right. Select the permissions and the corresponding usernames.

The user roles follow the requirements in section 4. If the role does not support adding permissions, the checkbox will be disabled.

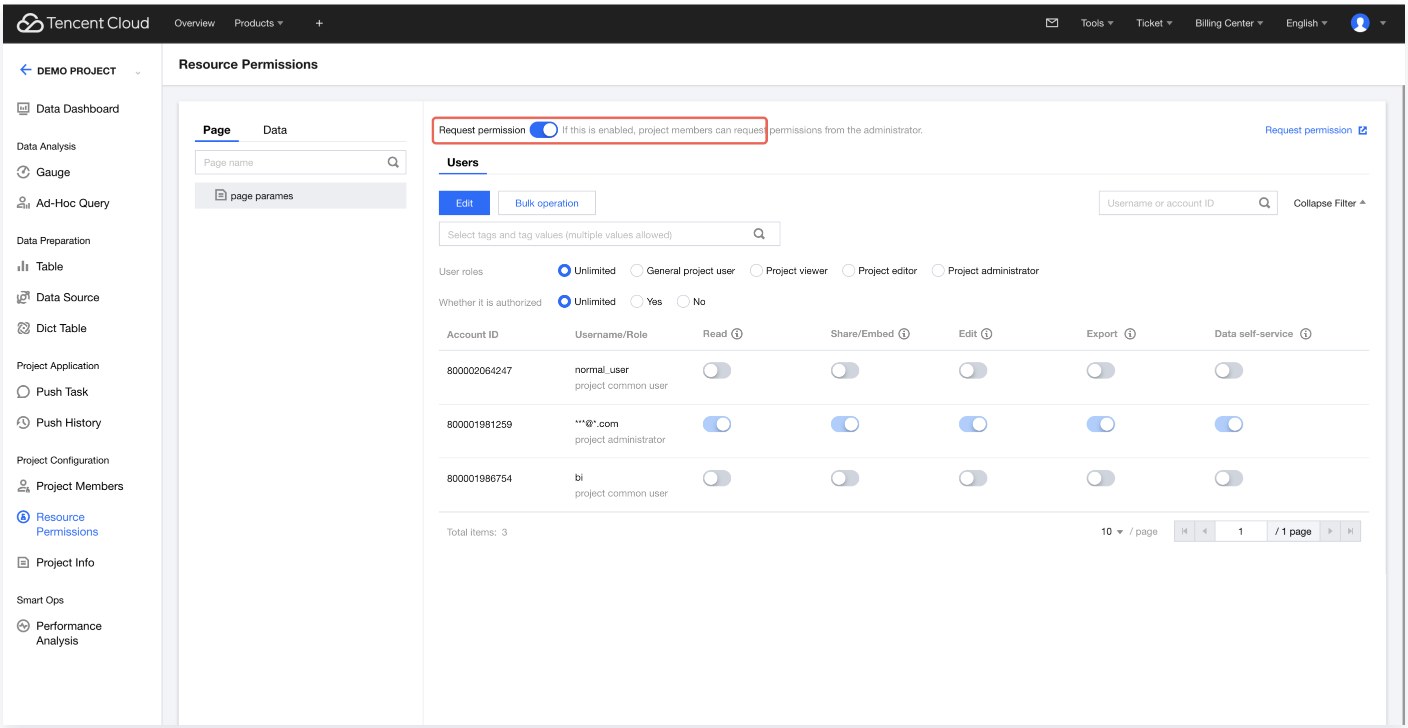


Support filtering users based on the tag values configured in Tag Management, and assigning permissions in batches according to the filtered list.

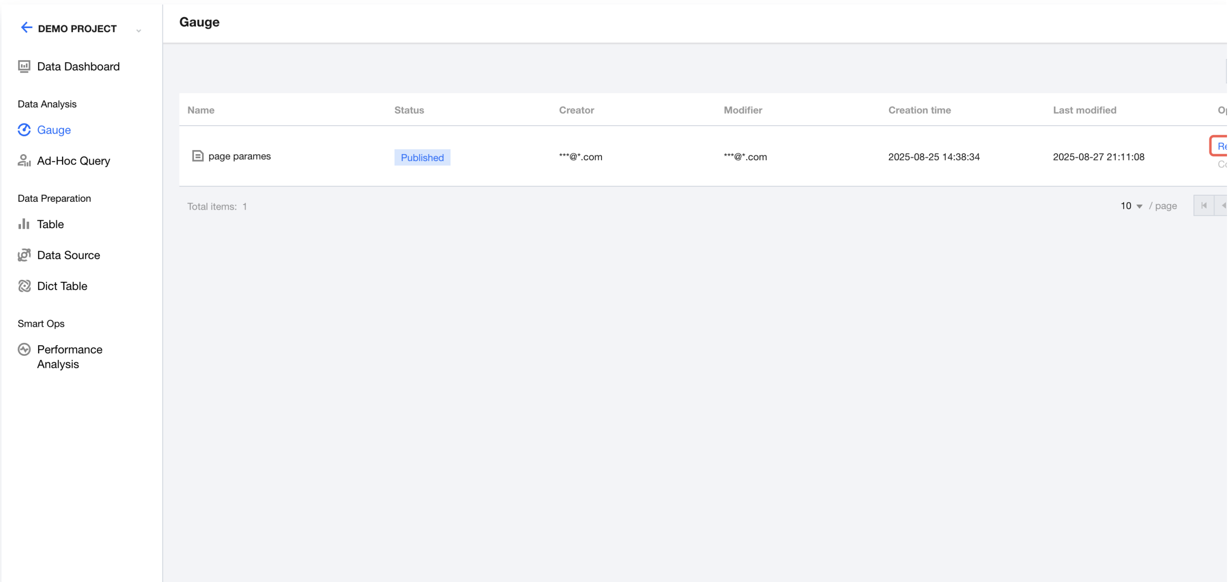


Operation Steps for Applying for Page Permissions

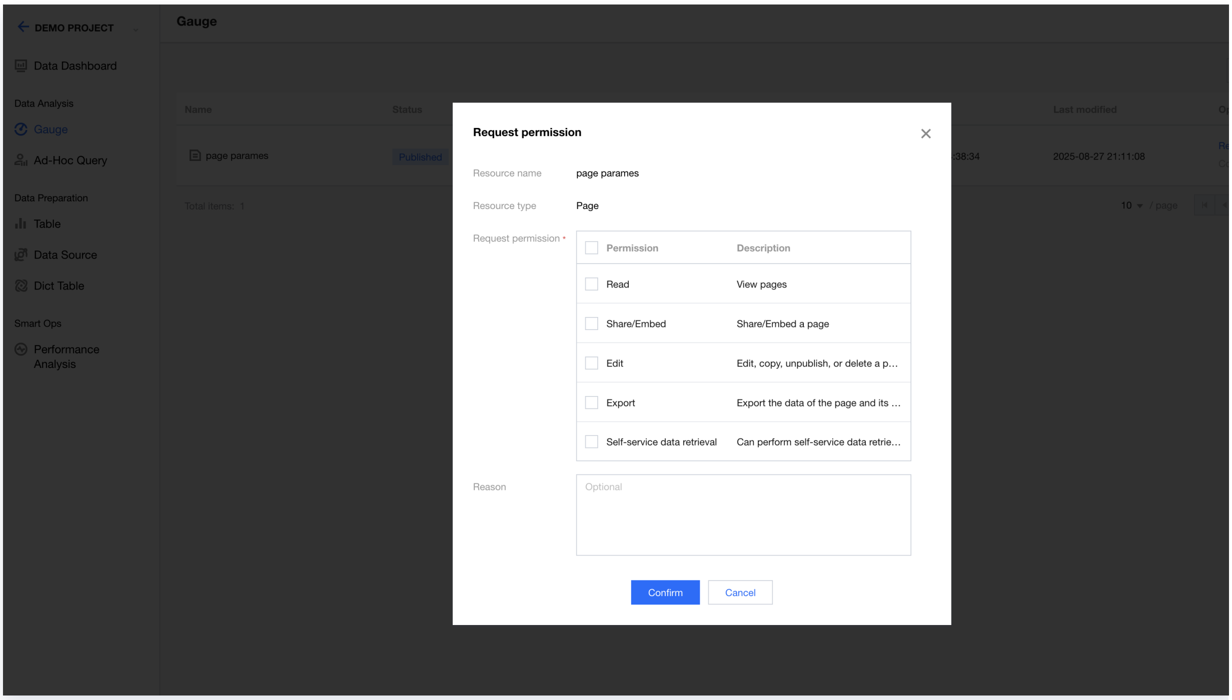
Prerequisite: When the permission application switch is turned on, users are allowed to request permission in the dashboard page list.



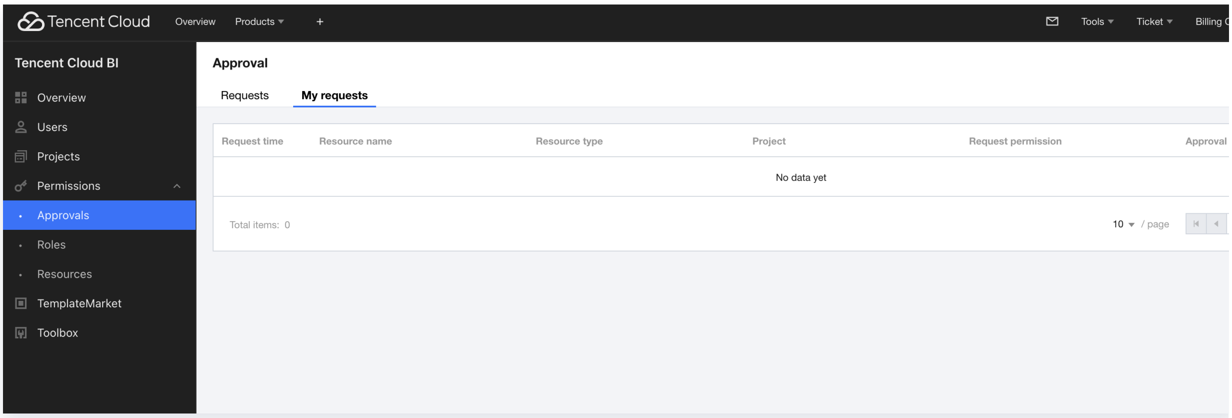
1. Go to Project Management > the Page tab > **Permission Application.**



2. Edit the required permissions in the permission application pop-up window, and click **Confirm.**

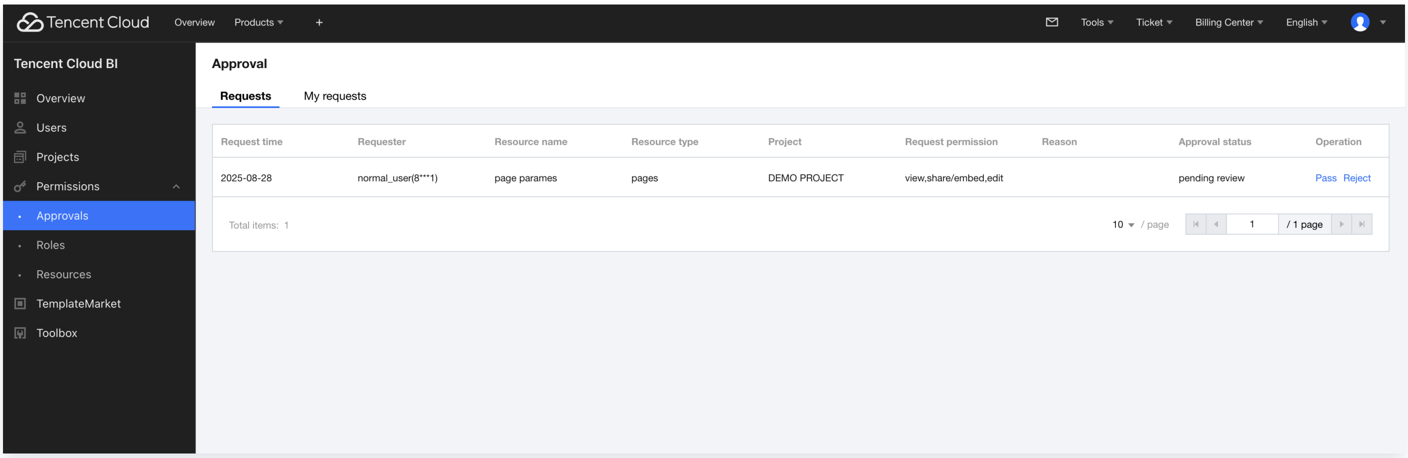


3. Go to Permission Management > Application Approval > the My Applications tab to view the application lis



Operation Steps for Approving Page Permissions

Go to Permission Management > Application Approval > the approval tab to view the application list and perform approval or rejection actions.


Tencent Cloud
Overview
Products
Tools
Ticket
Billing Center
English
Tencent Cloud BI
Overview
Users
Projects
Permissions
Approvals
Roles
Resources
TemplateMarket
Toolbox
Approval
Requests
My requests
Request time
Requester
Resource name
Resource type
Project
Request permission
Reason
Approval status
Operation
2025-08-28
normal_user(8***1)
page parames
pages
DEMO PROJECT
view,share/embed,edit
pending review
Pass
Reject
Total items: 1
10 / page
1
/ 1 page

Data Row/Column Level Permissions

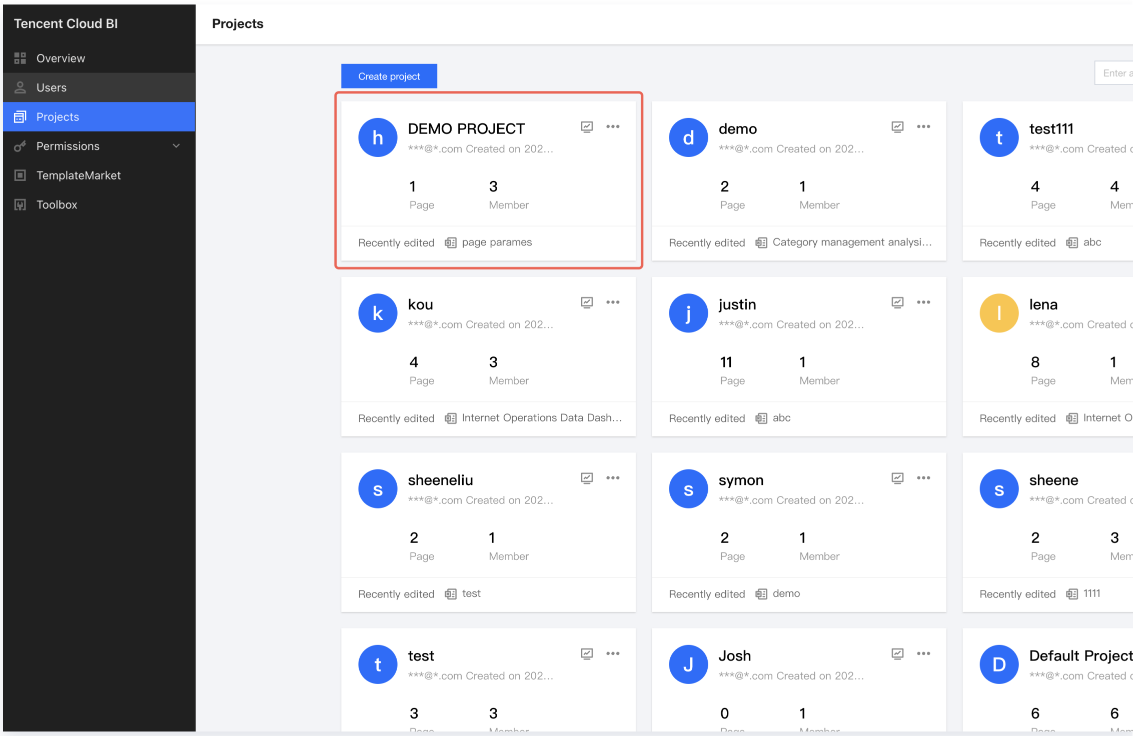
Last updated：2025-09-19 15:30:17

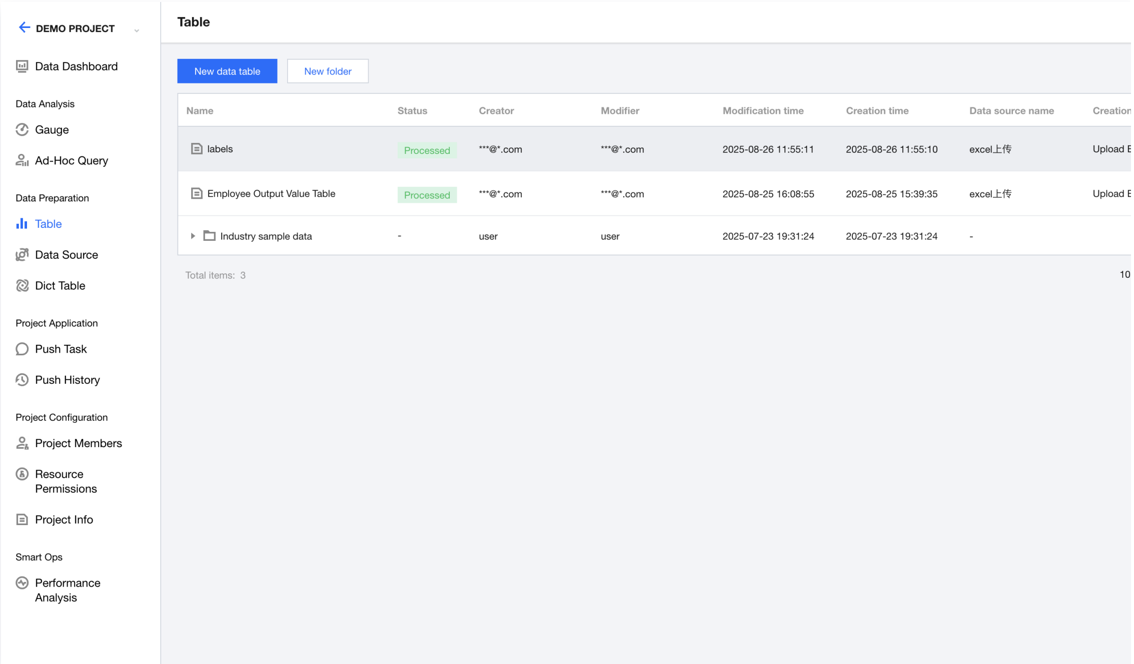
Through the data table row/column level permission management in Business Intelligence (BI), different users can only view the specified rows or columns when accessing the same data table.
For example, User A is the company's general manager, User B is the regional manager for Beijing, and User C is the regional manager for Shanghai. Through the row/column level permission management, you can configure that User A can view all sales data across the company, including the gross profit data, User B can only view the sales data for the Beijing region, and cannot see the gross profit data, and User C can only view the sales data for the Shanghai region, and cannot see the gross profit data.

Edition limitation of feature usage: This feature is only supported for Professional Edition users.

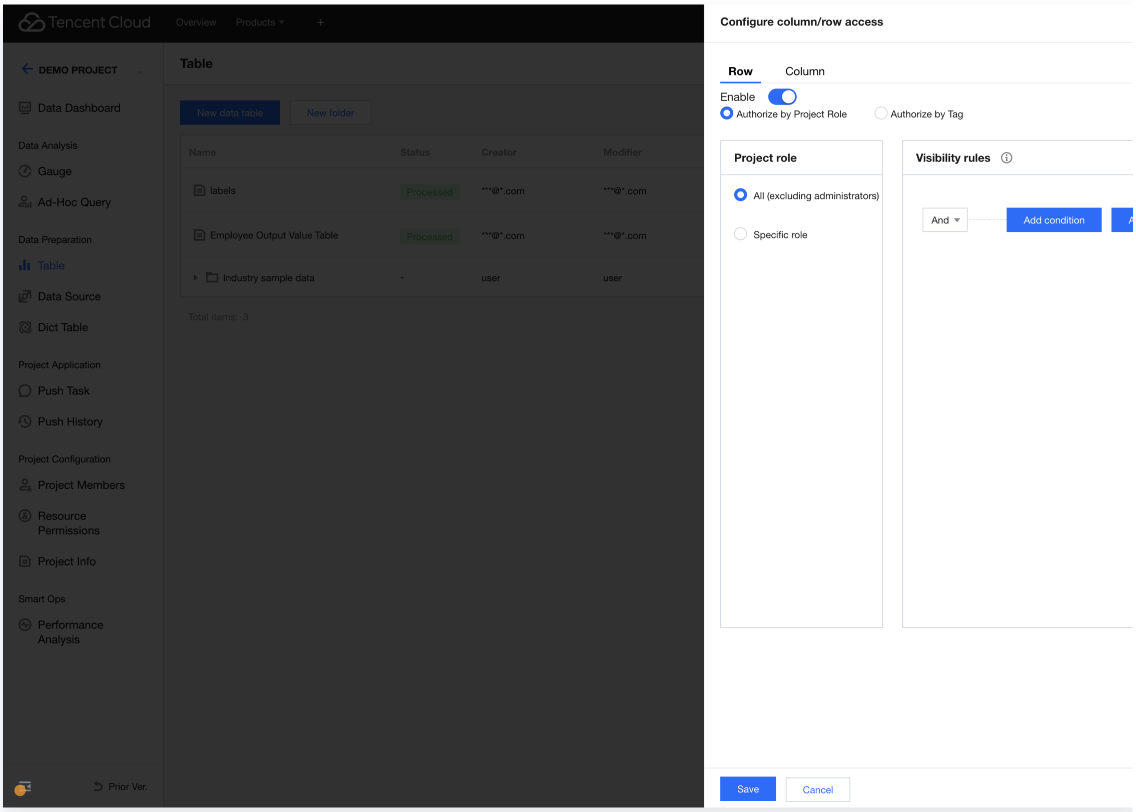
Data Table Row-Level Permissions

1. Enter the **project management module**, go to the **corresponding project data Tab**, and select "Row/Colu operation of the corresponding data table. A drawer will pop up.


Tencent Cloud BI
Overview
Users
Projects
Permissions
TemplateMarket
Toolbox
Projects
Create project
DEMO PROJECT
Recently edited
page parames
demo
Category management analysi...
test111
abc
kou
Internet Operations Data Dash...
justin
lena
sheeneliu
test
symon
sheene
Josh
Default Project
Page
Member



2. In the row and column permission configuration drawer > row-level permissions, you can configure row pe



3. Click the Enable permissions switch to enable or disable the row permissions for the data table.

Project Role-based Authorization

In the project role section, you can either select all roles (enterprise administrators and project administrators are not restricted by row permissions) or specify individual roles to configure the row permission conditions. (“Other roles” cover anonymous users accessing shared pages without logging in.)

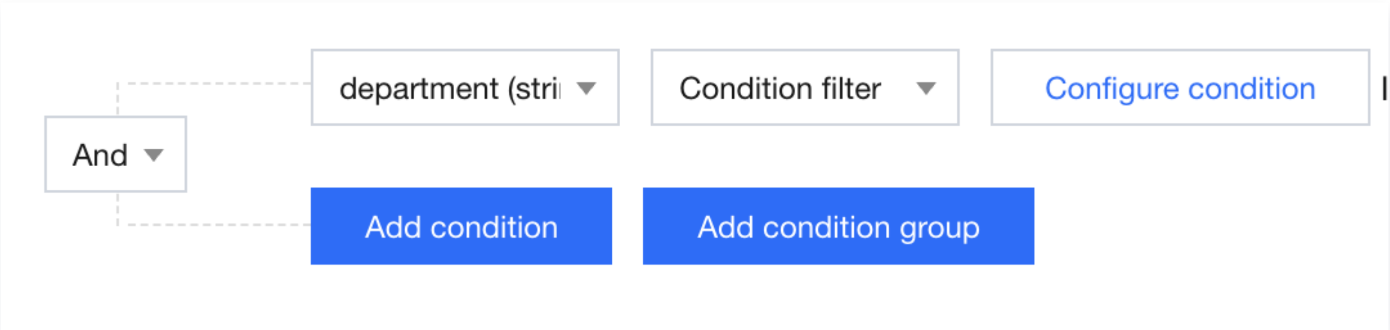
In the visibility rules section, you can configure the row permission conditions, and rule types can be selected according to the data field type.

Rule Type	String	Date	Numerical value
Conditional filtering	√	√	√
Field value enumeration	√	√	

Associated tags	√	√	√

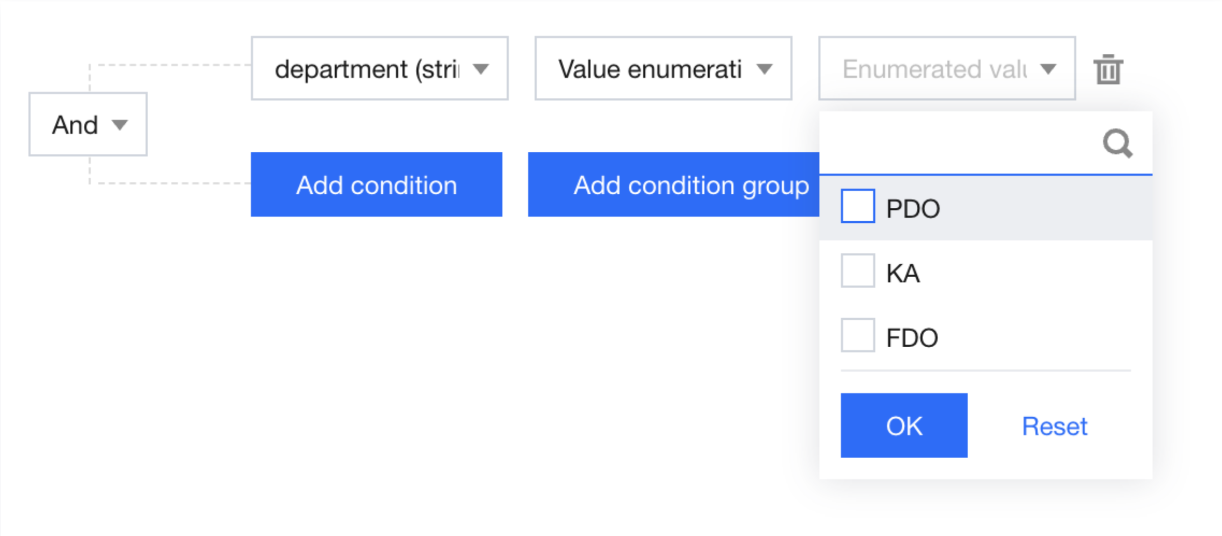
① Conditional filtering.

The data scope viewable to users with the corresponding role includes row data where the field value of the selected field meets the set conditions:



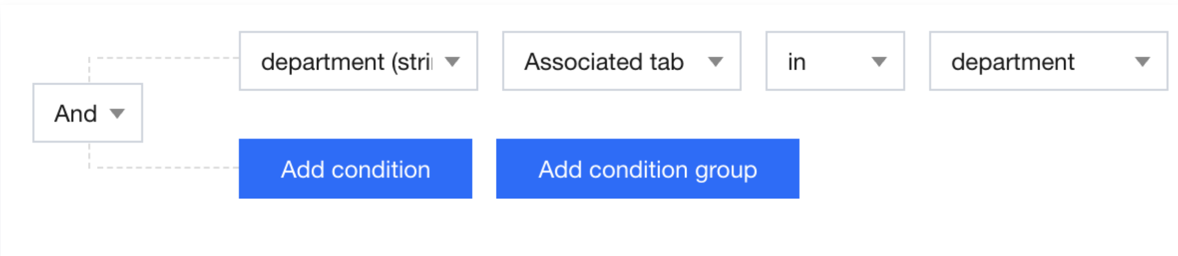
② Field value enumeration.

The data scope viewable to users with the corresponding role includes the corresponding data rows where the field value of the selected field matches the enumeration values selected on the right.



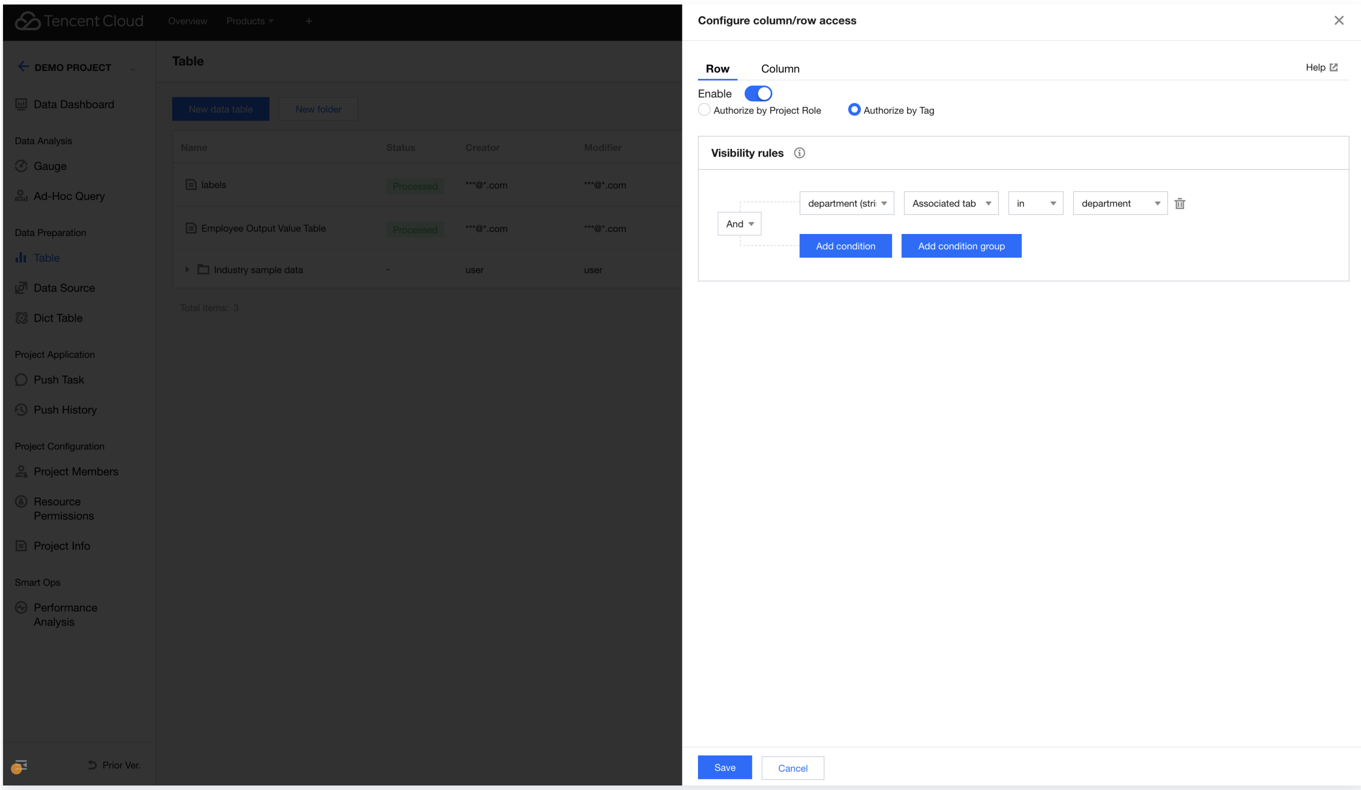
③ Associated tags.

The data scope viewable to users with the corresponding role includes the corresponding data rows where the field value of the selected field matches the tag values of the tags selected on the right by the user.



Tag-based Authorization

After turning on the Enable permissions switch, select Tag-based Authorization.

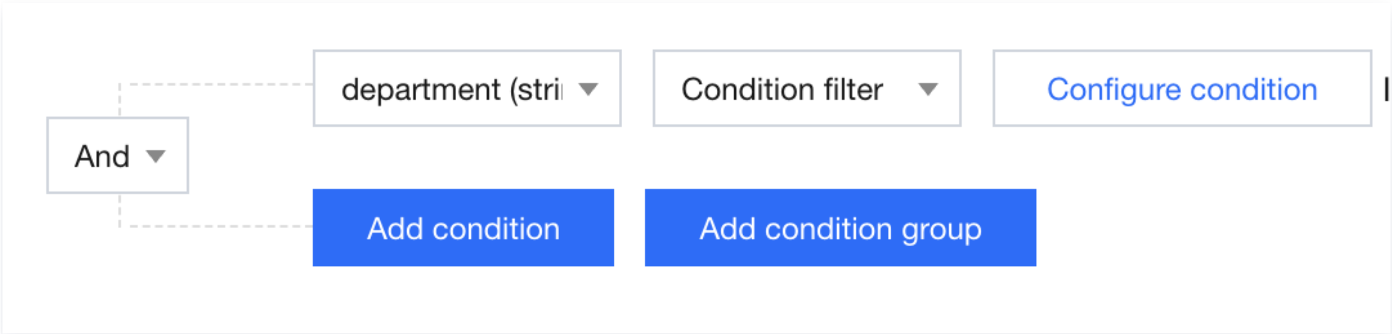


In the visibility rules section, you can configure the row permission conditions, and rule types can be selected according to the data field type.

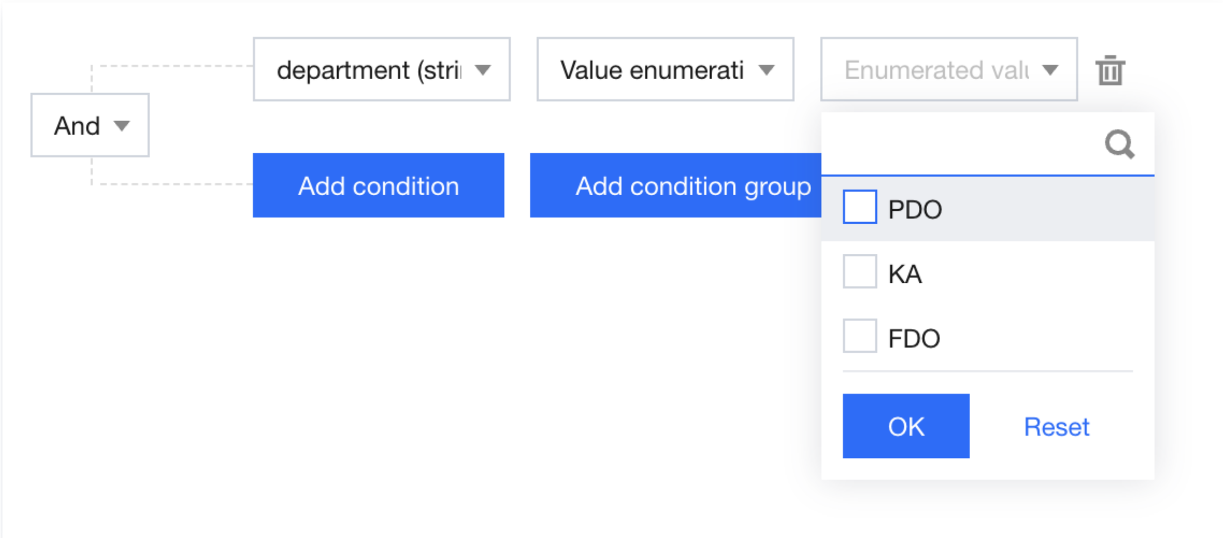
Rule Type	String	Date	Numerical value
Conditional filtering	√	√	√
Field value enumeration	√	√	
Associated tags	√	√	√

① Conditional filtering.

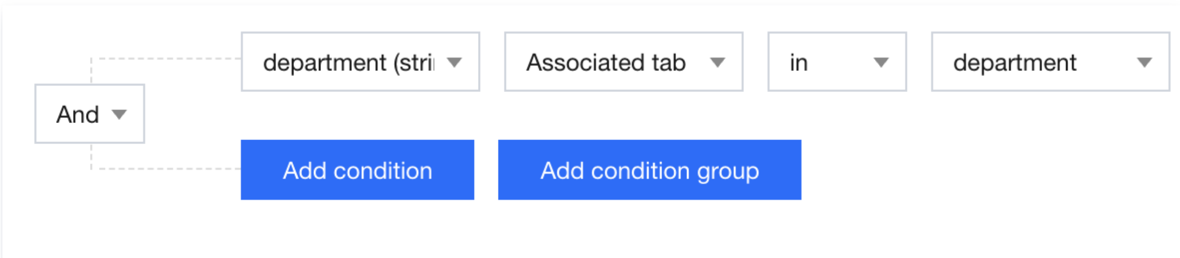
The data scope viewable to users with the corresponding role includes the corresponding rows where the field value of the selected field meets the set conditions:



② Field value enumeration.
The data scope viewable to users with the corresponding role includes the corresponding data rows where the field value of the selected field matches the enumeration values selected on the right.

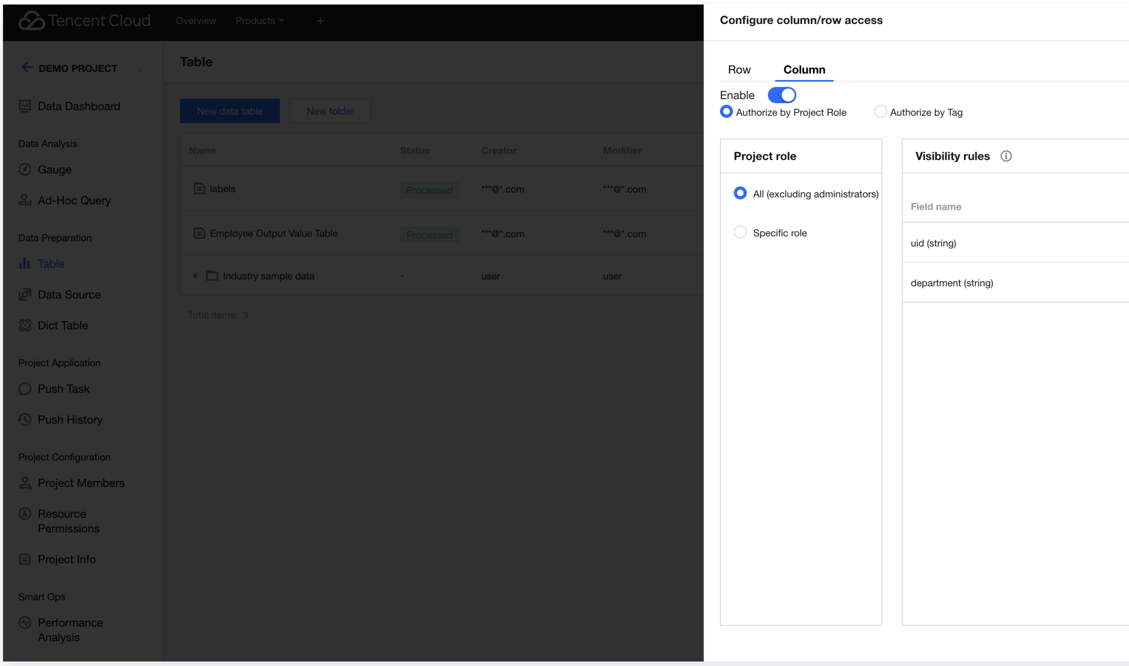


③ Associated tags.
The data scope viewable to users with the corresponding role includes the corresponding data rows where the field value of the selected field matches the tag values of the tags selected on the right by the user.



Data Table Column-Level Permissions

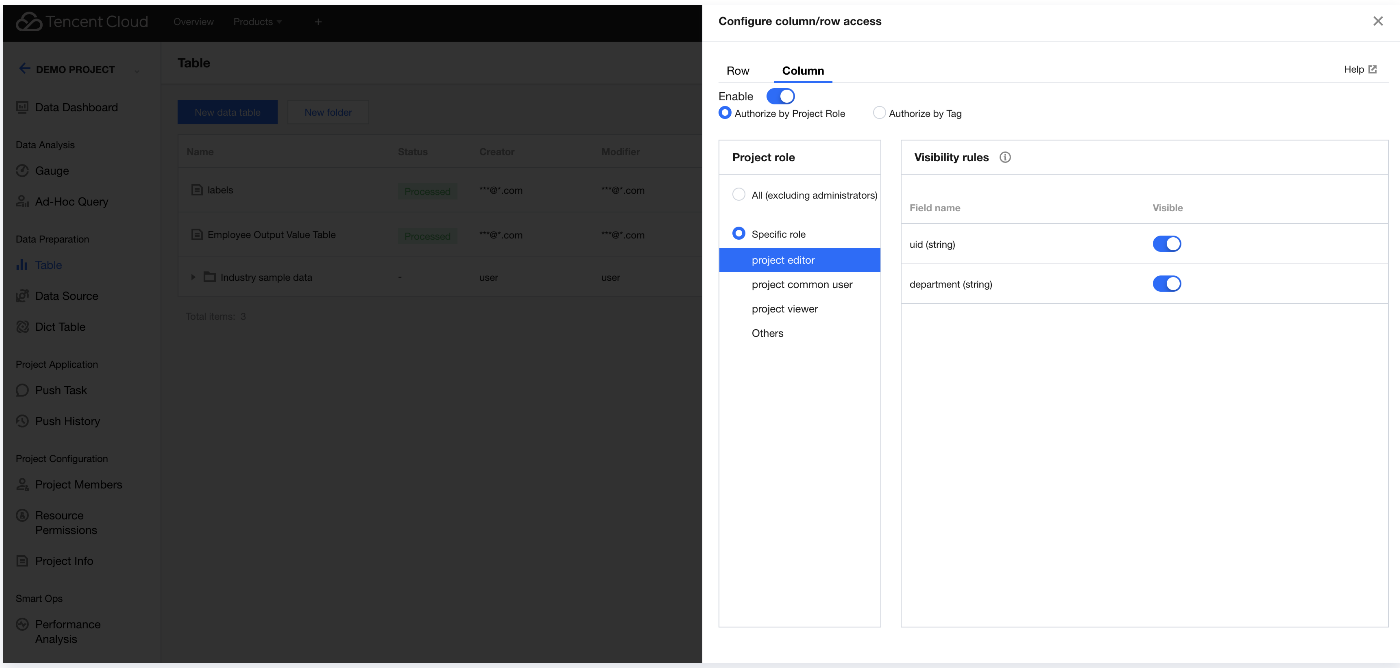
1. In the **row and column permission configuration drawer** > **column-level permissions**, you can configure c



2. Click the **Enable permissions** switch to enable or disable the column permissions for the data table.

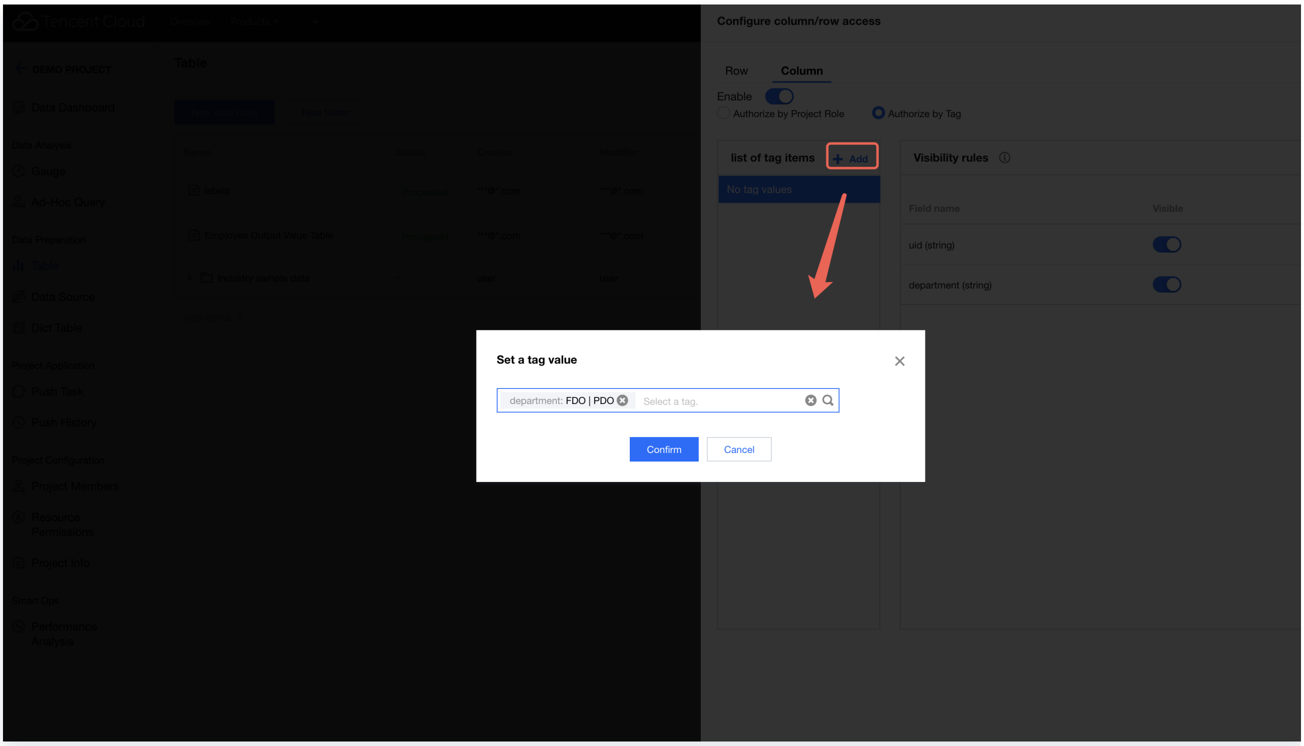
Project Role-based Authorization

1. In the project role section, you can either select all roles (enterprise administrators and project administrators are not restricted by column permissions) or specify individual roles to configure the row permission conditions. ("Other roles" cover anonymous users accessing shared pages without logging in.)
2. In the visibility rules section, you can configure the data column permission conditions and enable or disable the permissions to view the corresponding fields (enabled by default).

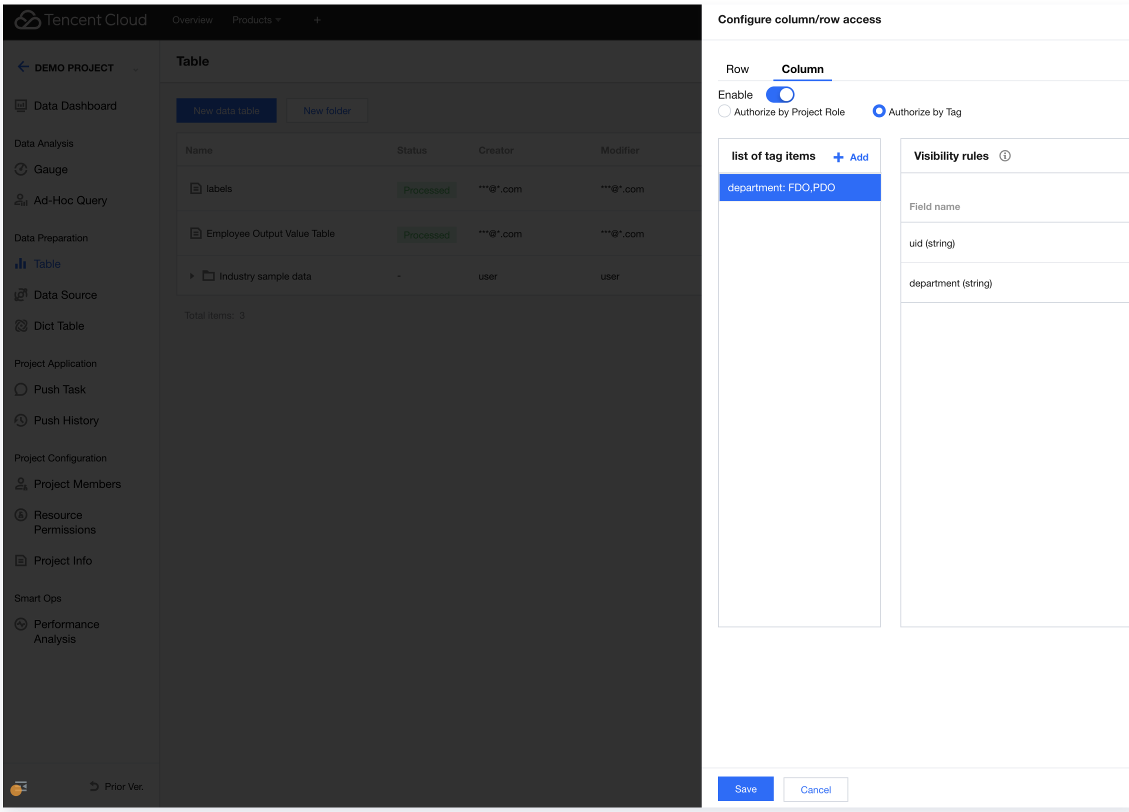


Tag-based Authorization

1. Click Add in the tag list. The available tags are created in Tag Management. You can select multiple value tag.



2. In the visibility rules section, you can configure the data column permission conditions and enable or disab
corresponding fields (enabled by default).


Configure column/row access
Row
Column
Enable
Authorize by Project Role
Authorize by Tag
list of tag items
Add
department: FDO,PDO
Visibility rules
Field name
uid (string)
department (string)
Save
Cancel
DEMO PROJECT
Table
Data Dashboard
Data Analysis
Gauge
Ad-Hoc Query
Data Preparation
Table
Data Source
Dict Table
Project Application
Push Task
Push History
Project Configuration
Project Members
Resource Permissions
Project Info
Smart Ops
Performance Analysis
Prior Ver.
labels
Employee Output Value Table
Industry sample data

Statistics and Analysis

Performance Analysis

Last updated: 2025-09-19 15:30:17

After a report is created and accessed by users, Business Intelligence (BI) provides performance analysis capabilities to monitor metrics, including report query duration, the number of chart queries, and chart query time.

This document introduces the following operations:

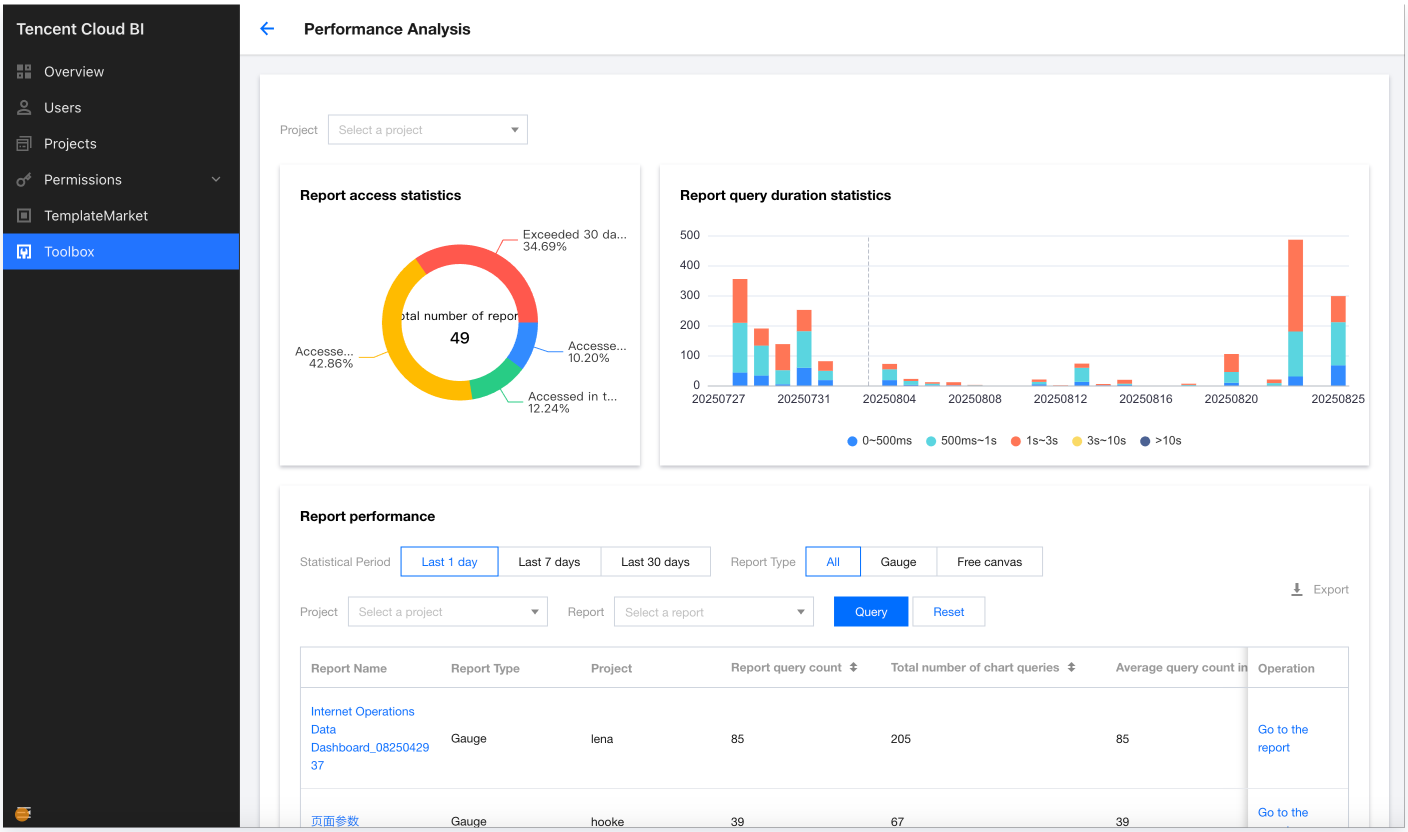
- Data overview.
- Report performance.
- Chart performance.
- Viewing performance in the project.

Access path:

- View all resources performance: Log in to BI console > Toolbox > Performance analysis.
- View project resource performance: Log in to BI console > Project Management > Select a project > Performance analysis.
- View chart performance in the canvas: Go to the page editor > hover over the chart > select Performance analysis in the toolbar.

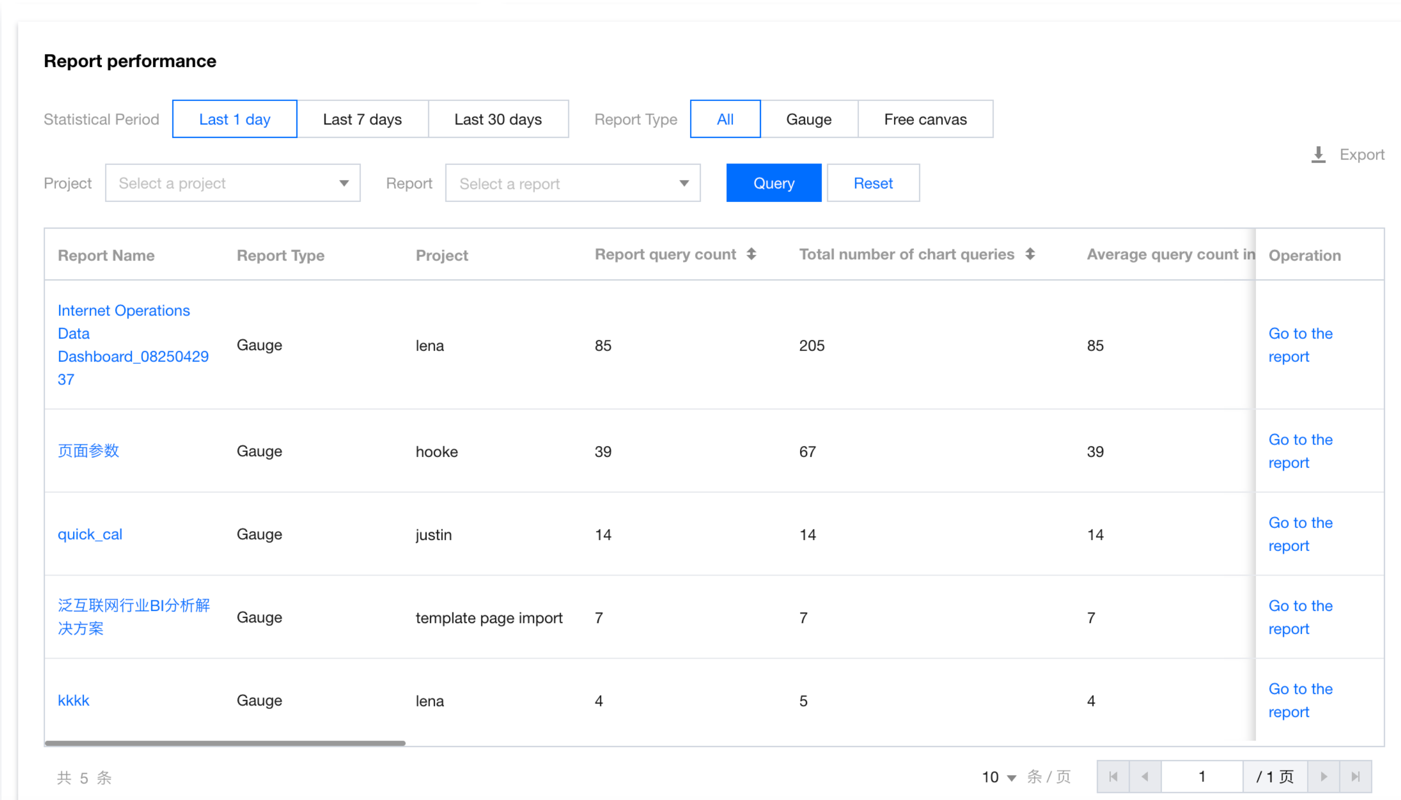
Data Overview

The data overview provides an overall view of report visits and a daily breakdown of query durations by time range.



Report Performance

Support viewing performance based on report granularity.



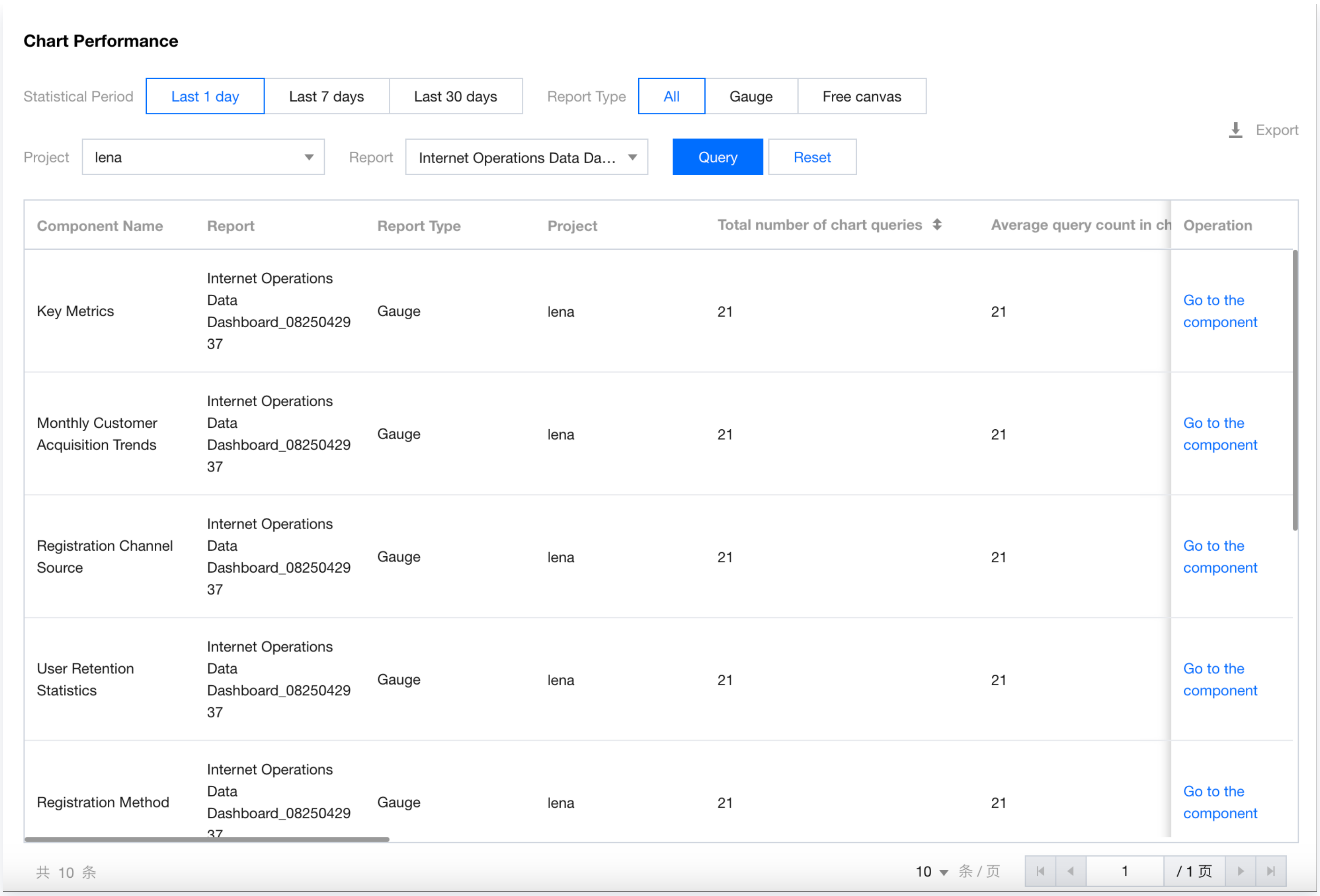
Field Description:

- Report name: The name of the visited report.
- Report type: The type of the visited report.
- Associated project: The project to which the visited report belongs.
- Report query count: The number of visits to the page.
- Total chart query count: The total number of chart queries on the page.
- Average report query count: The average number of report queries per day during the selected time period.
- Average chart query count: The average number of chart queries per day under this report during the selected time period.
- Average chart query duration: The average time spent on each chart query under this report during the selected time period.
- Chart cache hit count: The number of cache reads for charts under the report during the selected time period.

- Average chart cache hit duration (ms): The average time spent reading the report chart data from cache during the selected time period.
- Proportion of chart queries over 10s: The proportion of chart queries that took longer than 10 seconds to the total number of queries under the report during the selected time period.
- Chart query timeout count: The total number of chart query timeouts under the report during the selected time period.
- Proportion of chart query timeouts: The proportion of chart query timeouts to the total number of queries under the report during the selected time period.
- Chart refresh query count: The number of query requests triggered by refresh actions for charts under the report during the selected time period.
- Average chart refresh query duration (ms): The average time taken for chart queries triggered by refresh actions under the report during the selected time period.
- Count of chart queries using acceleration engine: The number of chart queries under the report accelerated by the data table during the selected time period.
- Average duration of chart queries using acceleration engine (ms): The average time taken for chart queries under the report accelerated by the data table during the selected time period.

Chart Performance

Support viewing performance at the chart level.



The field description is the same as the description for the report performance, but the scope is different. The chart performance only covers the current chart, not the entire report.

Exporting Details

Support exporting the performance data for the current query.

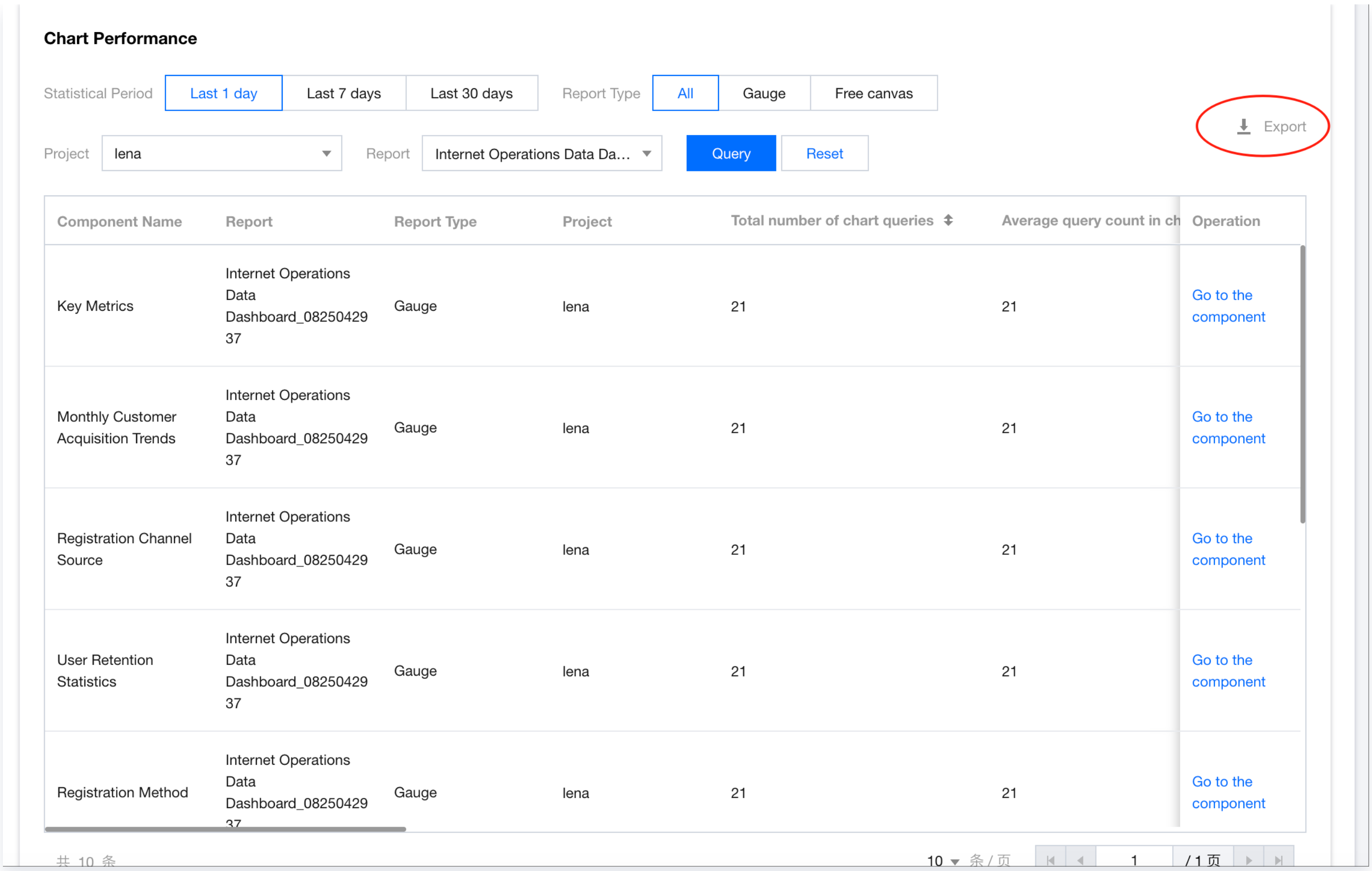


Chart Performance
Statistical Period
Last 1 day
Last 7 days
Last 30 days
Report Type
All
Gauge
Free canvas
Export
Project
lena
Report
Internet Operations Data Da...
Query
Reset
Component Name
Report
Report Type
Project
Total number of chart queries
Average query count in ch
Operation
Key Metrics
Internet Operations Data Dashboard_0825042937
Gauge
lena
21
21
Go to the component
Monthly Customer Acquisition Trends
Internet Operations Data Dashboard_0825042937
Gauge
lena
21
21
Go to the component
Registration Channel Source
Internet Operations Data Dashboard_0825042937
Gauge
lena
21
21
Go to the component
User Retention Statistics
Internet Operations Data Dashboard_0825042937
Gauge
lena
21
21
Go to the component
Registration Method
Internet Operations Data Dashboard_0825042937
Gauge
lena
21
21
Go to the component

System Settings

Common Time Settings

Last updated：2025-09-19 15:30:18

Note:
Modification of the common time will affect published reports. Assess the impact and make adjustments based on actual requirements.

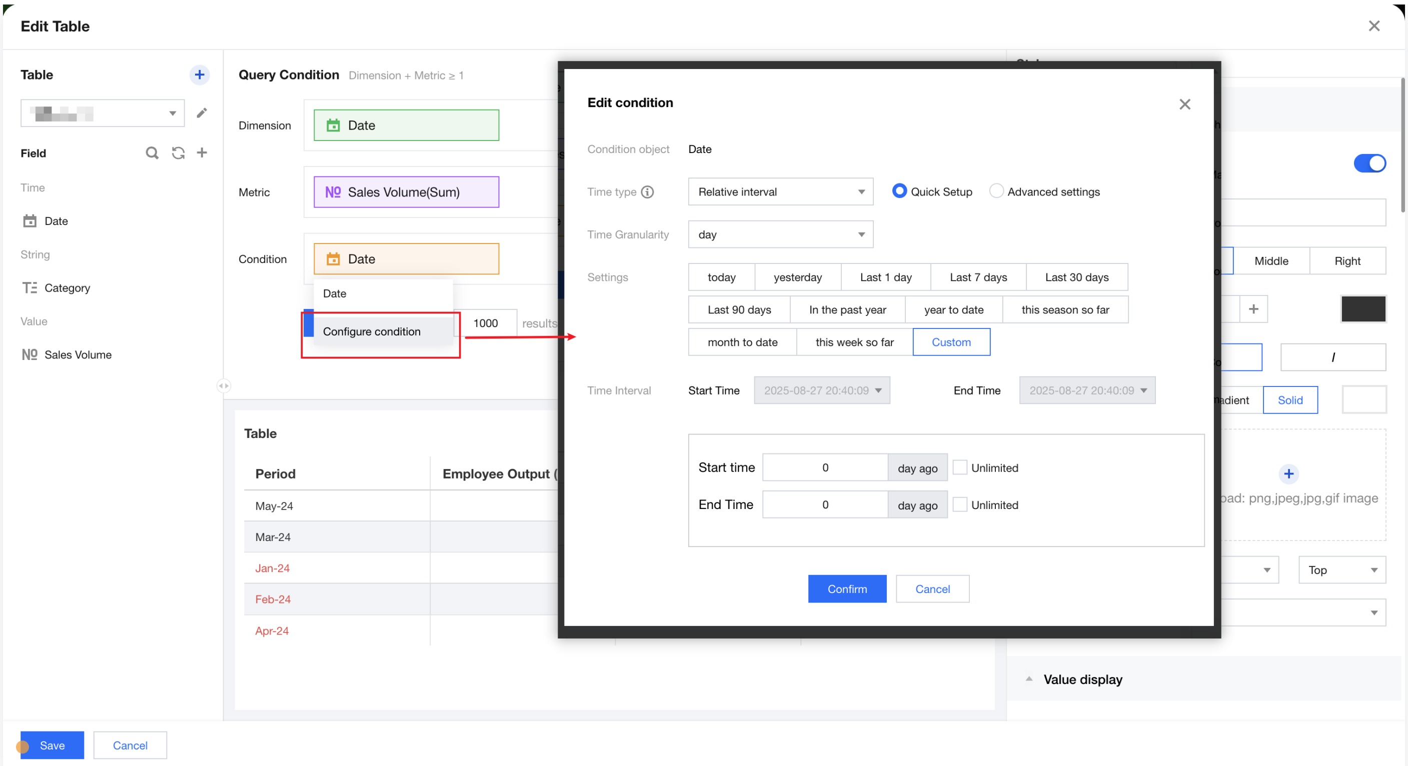
In practical scenarios, users may need to define the last N days (relative time), a specific date (absolute time), or the current fiscal year (combinations of absolute time and relative time). The common time settings allow a flexible definition of these time descriptions.

Prerequisite: Currently, only administrators are allowed to edit.

This document introduces the following operations:
- Initializing time settings for the analysis condition fields.
- Initializing common time settings for filters.
- Descriptions for complex time configurations.
- Editing and deleting time settings.

Initializing Time Settings for the Analysis Condition Fields

When performing chart analysis, if you need to filter detailed data based on the time field, you will need to use a time component, as shown in the figure below.

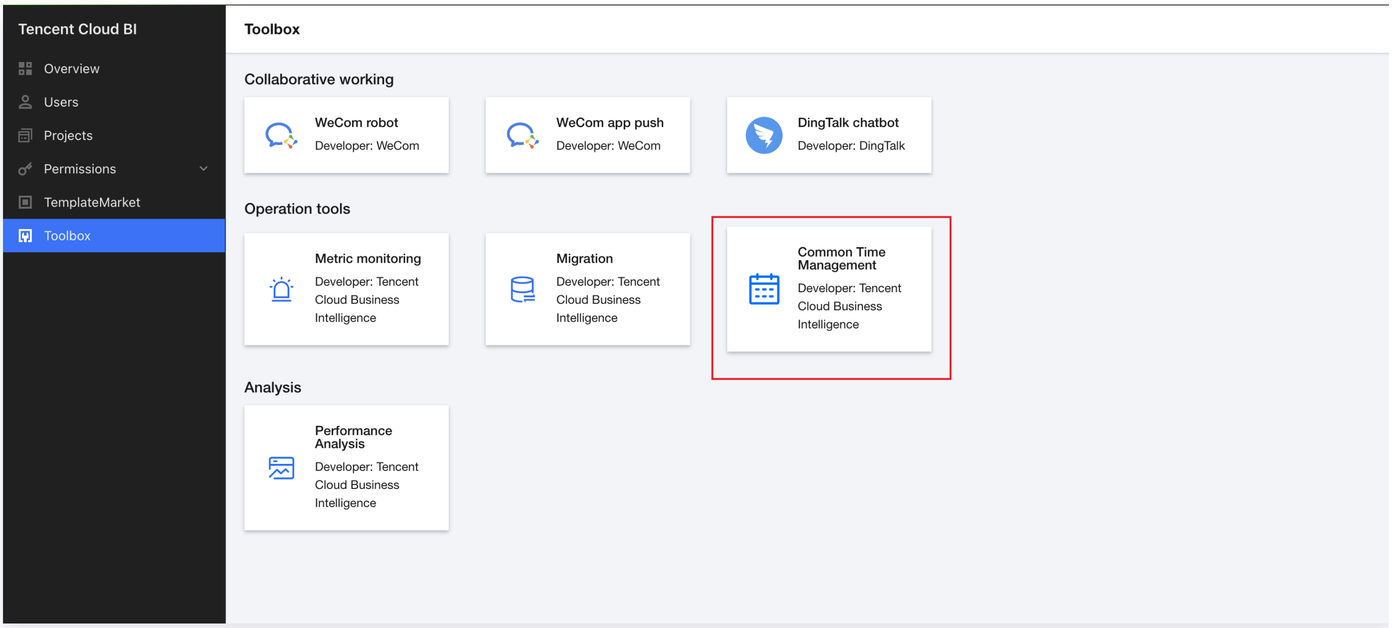


The system provides a default set of time definitions, but different teams may interpret time ranges differently. For example, the last 1 day can have multiple interpretations (as illustrated below using the current time 2025/03/11 12:23:21 as a reference):

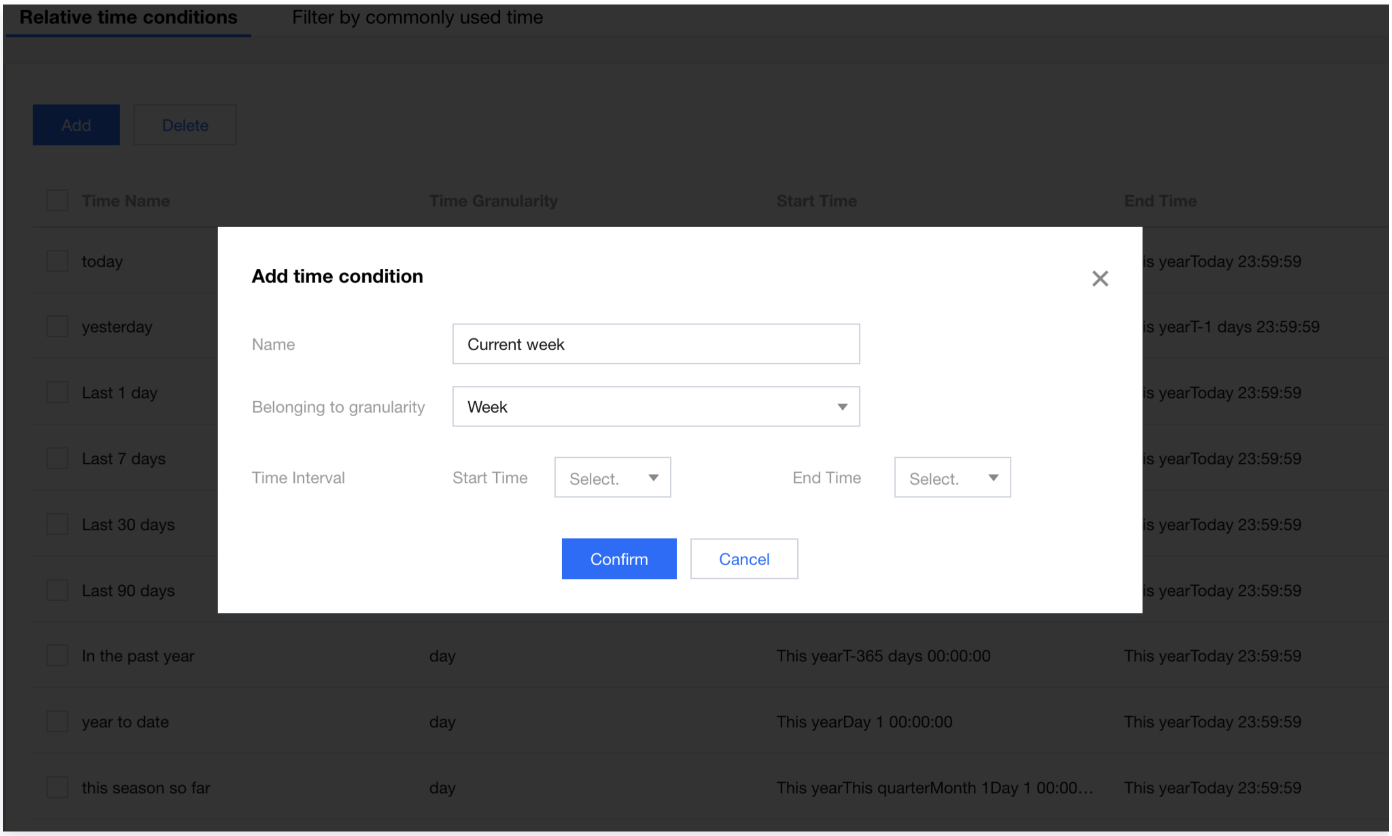
- 24 hours back from the current time: From 2025/03/10 12:23:21 to 2025/03/11 12:23:21.
- From midnight yesterday to the end of today: From 2025/03/10 00:00:00 to 2025/03/11 23:59:59.
- From midnight yesterday to the current time today: From 2025/03/10 00:00:00 to 2025/03/11 12:23:21.

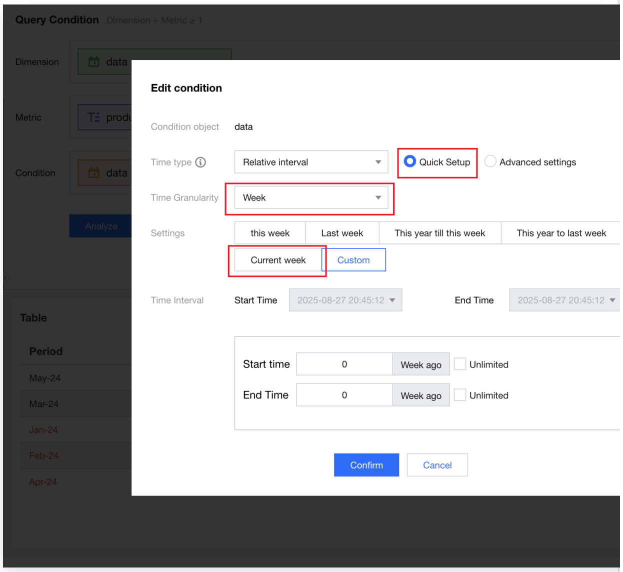
Next, we'll use the example of adding a "Current settlement week" to demonstrate how to configure time (assuming the settlement week is defined as from last Wednesday to this Tuesday).

1. Go to BI Console > Toolbox > Common time management > Relative time condition.

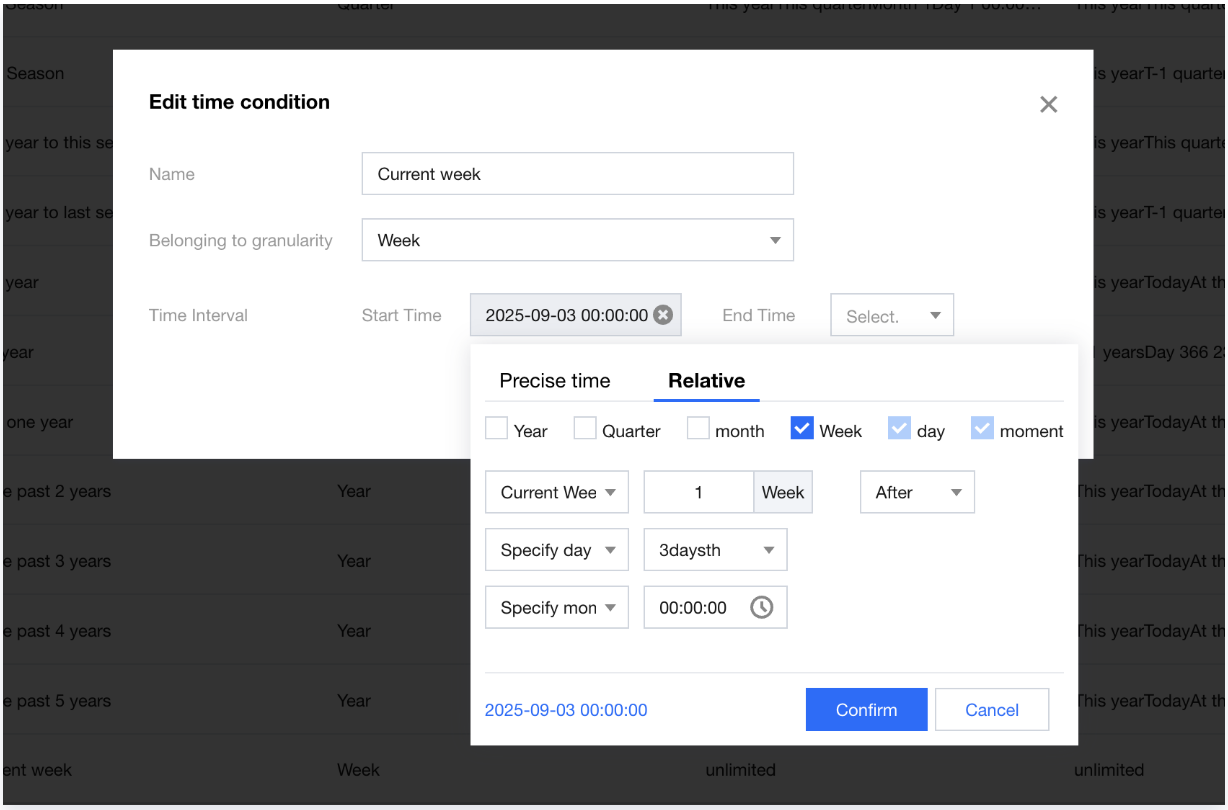


2. Click **Add** to create a "Current settlement week" time condition.



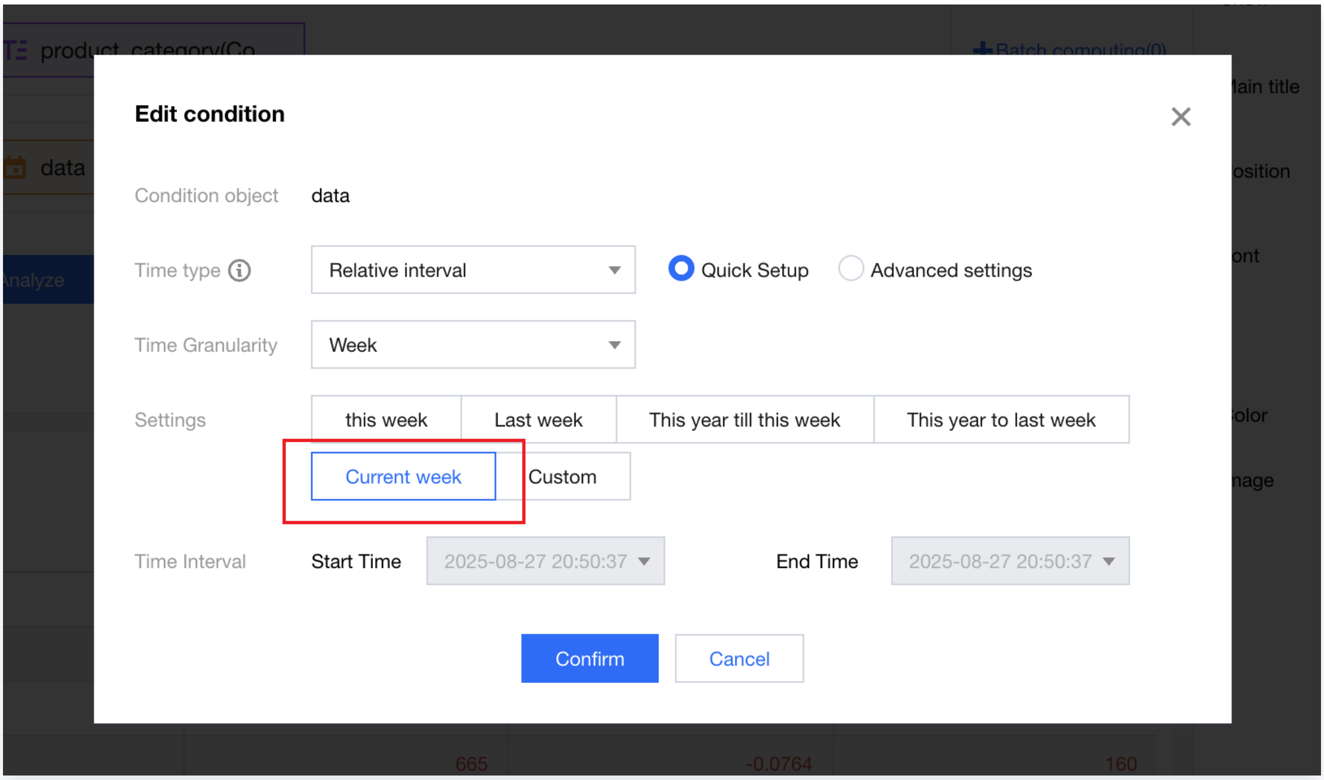
Settings	Settings Description	Remarks
Name	Set the display name shown in the analysis field filter.	–
Associated granularity	The time granularity level at which this time condition will be visible.	If you select "Week" here, when filtering by the time field, choosing the weekly granularity will display the currently configured time condition, as shown in the figure below. 
Time interval	Set the start time and end time.	For details, see Descriptions for Complex Time Configurations.

3. Set the start time and end time of the time interval.
    - Select relative time, check week, day, and time, and set each as follows.
        - Set the week to 1 week prior.
        - Specify the day as day 3 (Wednesday).
        - Specify the time as 00:00:00.



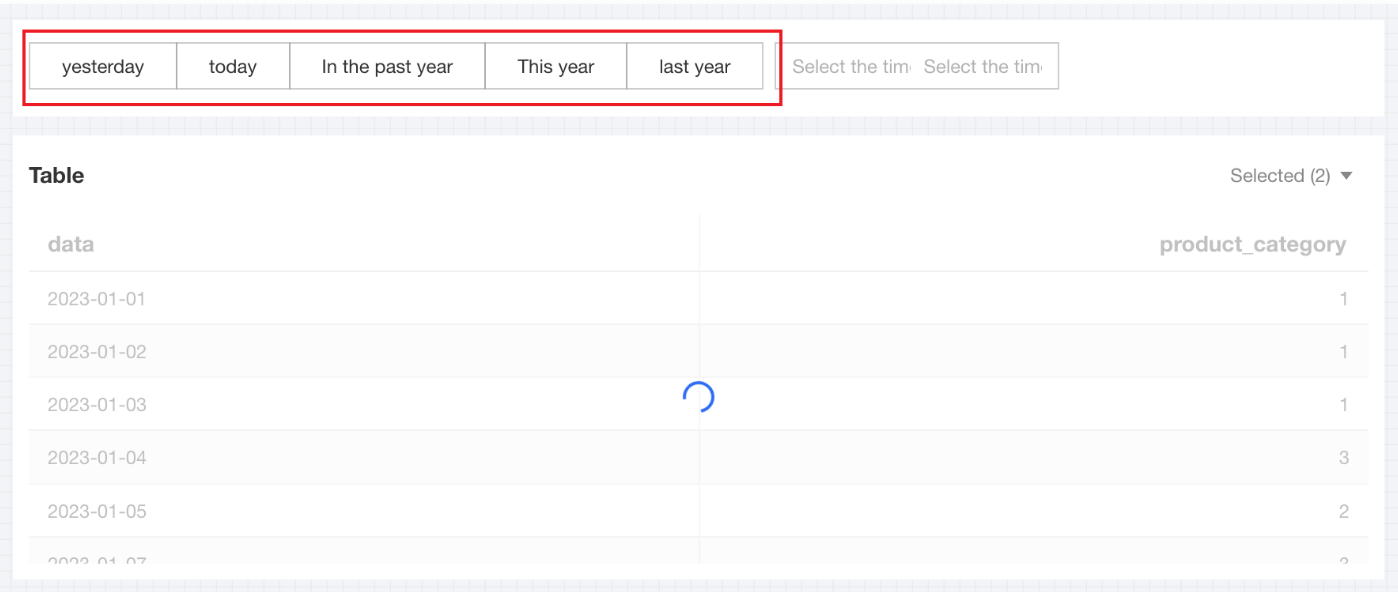
Next to the “Confirm” button, you can see the time result based on the current time as a reference (not the final result). Click “Confirm” to complete the start time definition.

- Similarly, complete the definition of the end time. The end time is set as follows.
  - Set the week to the current week.
  - Specify the day as day 2 (Tuesday).
  - Specify the time as 23:59:59.
- Save the time settings, and the system will generate a time condition named "Current settlement week".
- When the analysis condition fields are filtered, the "Current settlement week" is visible under the "Week" granularity.

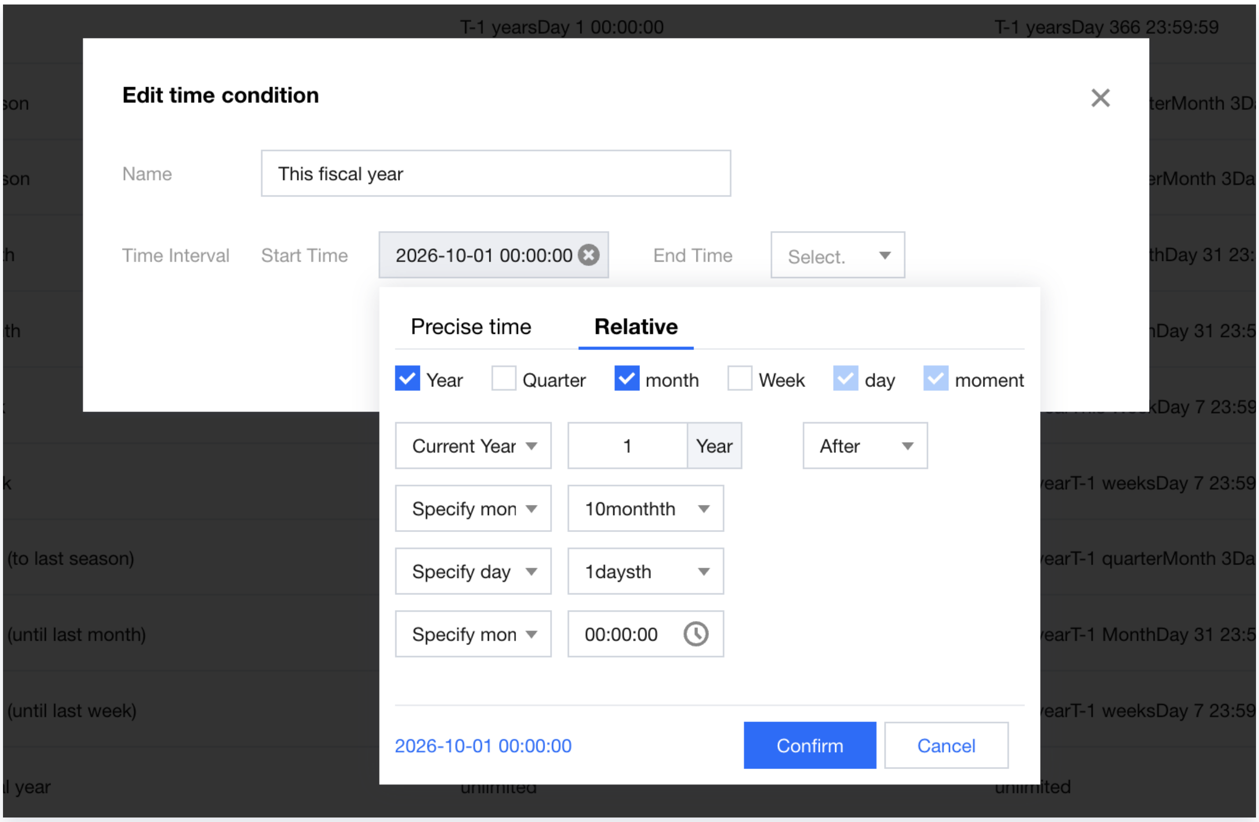


Initializing Common Time Settings for Filters

When using the time filter, users can quickly select a time range with the quick time options. As shown below, the Year to Date (YTD) range can be selected with a single click.

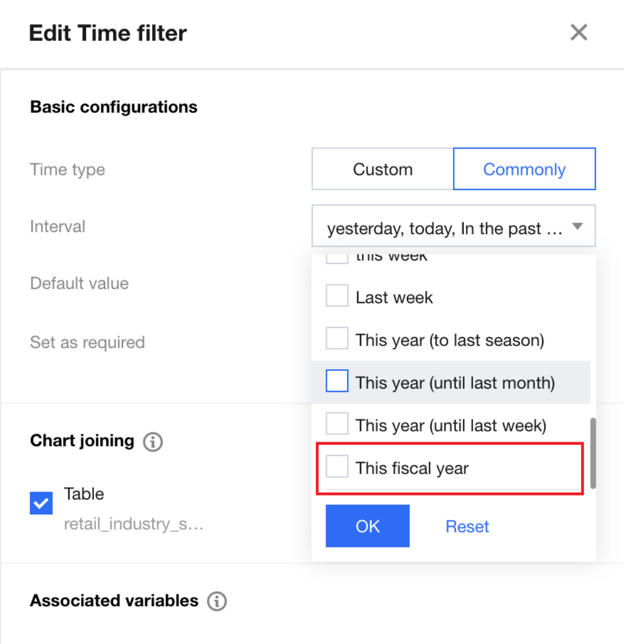


1. Go to BI Console > Toolbox > Common time management > Common time for filters, and click "Add" to add a "This fiscal year" time condition:



2. Set the start time and end time of the time interval.
   - Select relative time, check year, month, day, and time, and set each as follows.
     - Set the year to 1 year prior.
     - Specify the month as month 10.
     - Specify the day as day 1.
     - Specify the time as 00:00:00.

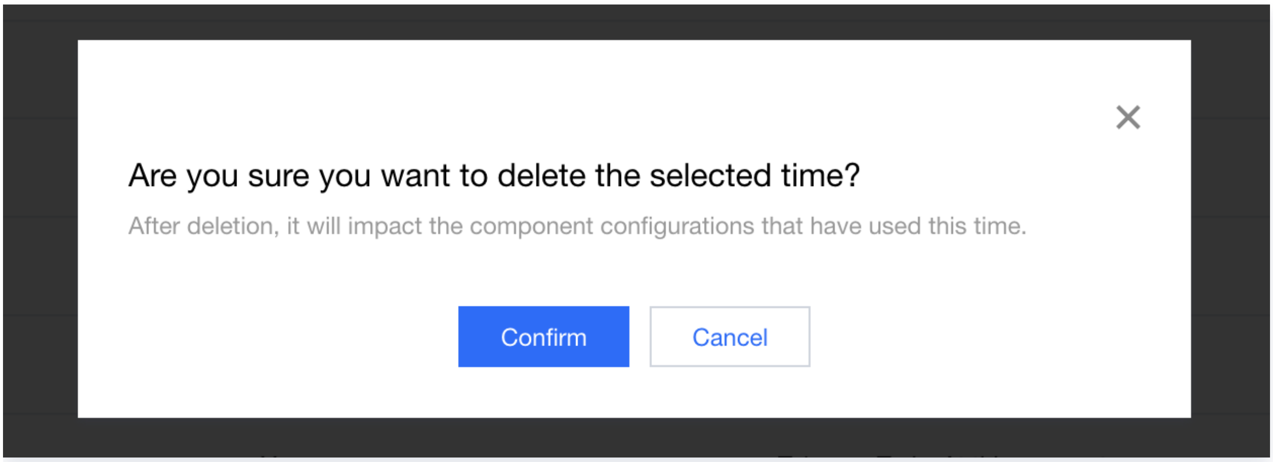
     Next to the “Confirm” button, you can see the time result based on the current time as a reference (not the final result). Click “Confirm” to complete the start time definition.
   - Similarly, complete the definition of the end time. The end time is set as follows.
     - Set the year to the current year.
     - Specify the month as month 9.
     - Specify the day as day 30.
     - Specify the time as 23:59:59.
   - Save the time settings, and the system will generate a time condition named "This fiscal year".
   - Select the newly added "This fiscal year" in the time filter.



- A quick time option named "This fiscal year" will now appear in the time filter.

Editing and Deleting Time Settings

The system administrator can edit and delete time conditions. A confirmation is required before deletion.



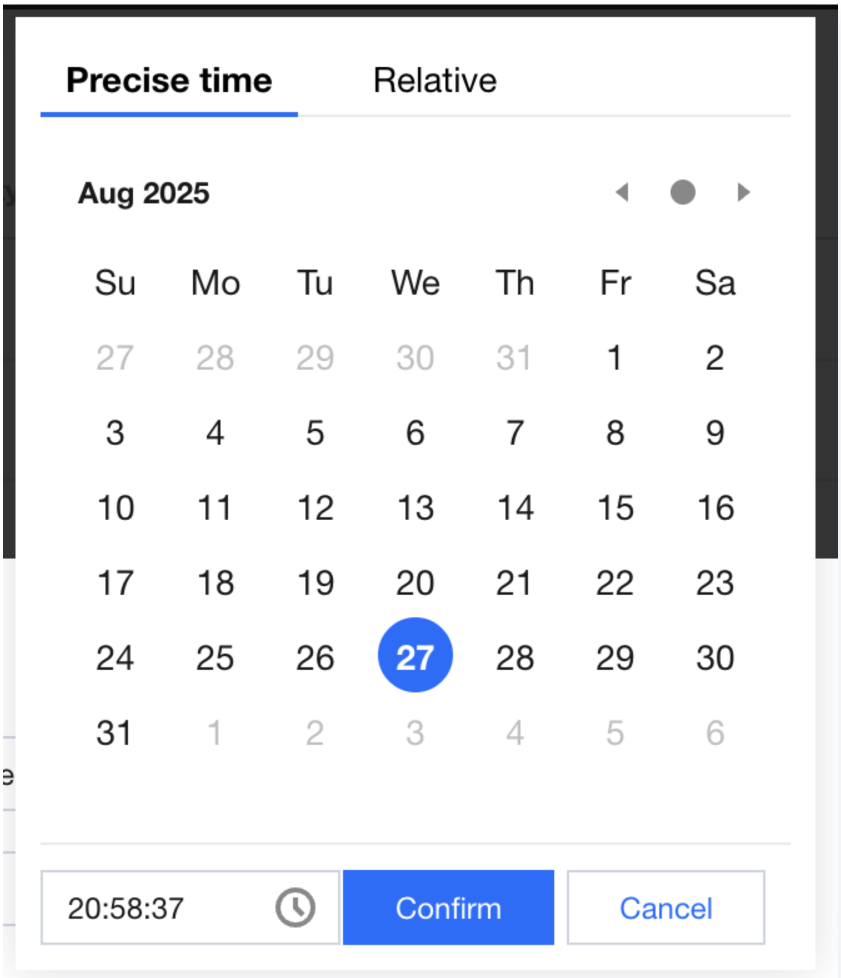
Click **Edit** to modify the time definitions.

> Note:

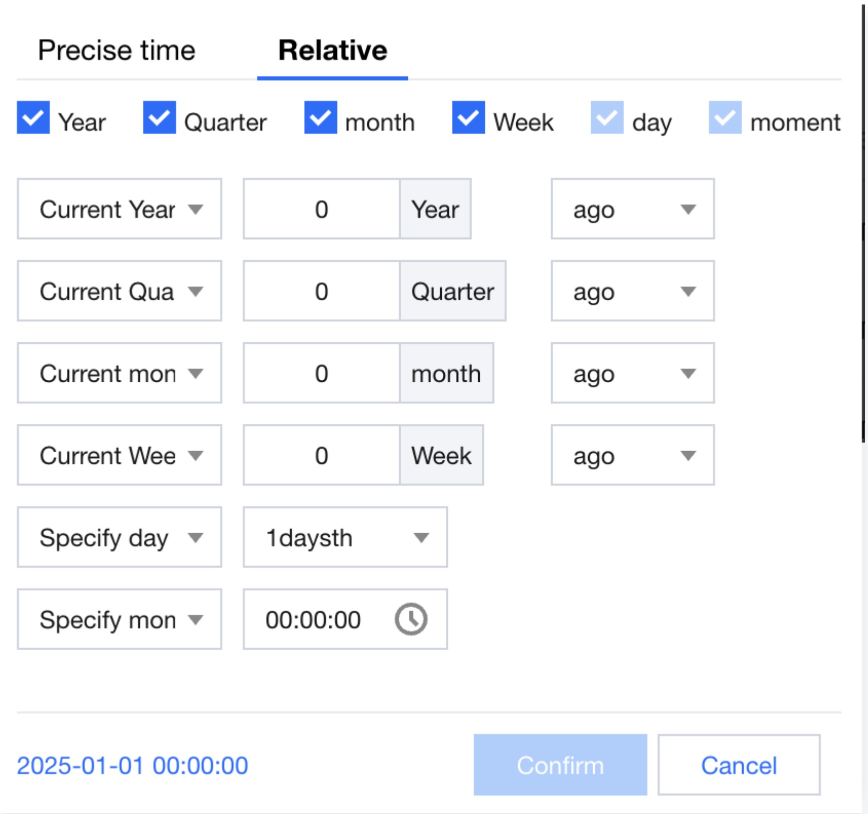
1. Once the time configurations are modified, the previously used reports will execute queries based on the updated time definitions.
2. After a time condition is deleted, even if a new one is created with the same name and definitions, the new time will not appear by default in the filter. To use the time in the filter again, you need to manually select the time in the filter settings.

Descriptions for Complex Time Configurations

The time configuration panel includes **Exact Time** and **Relative Time** settings. Exact time allows users to select a fixed time through a calendar, while relative time supports more complex time configurations.



Relative time configurations include the following parts.



In the time granularity section, users can select the required granularities to serve as references for anchoring the target time. Use the following process to determine the granularities.

- Describe the target time: For example, the same day last year or 3 months prior to the same day last year.
- Select the granularity based on the described time.
  - Same day last year: Select year and day (day and time are required).
  - 3 months prior to the same day last year: Select year, month, and day.

After selecting a granularity, you can configure the granularity using either of the 2 methods.

- Relative: Add or subtract from the current time. For example, "Current month – 2 months – Prior" means subtracting 2 months from the current month.
- Specified: Based on the specified number. For example, "Specified day – Day 31" means the 31st day of the month (if the month doesn't have 31 days, it refers to the last day of the month).

Next, we will provide examples of common scenarios and the configurations for your reference.

Scenario	Configuration
Year to date (YTD)	Start time: Current year, 0 year prior + specified day, day 1 + specified time, 00:00:00. End Time: Current day, 0 day prior + current time, 00:00:00 prior.

Month to date (MTD)	Start time: Current month, 0 month prior + specified day, day 1 + specified time, 00:00:00. End time: Current day, 0 day prior + current time, 00:00:00 prior.
Last 7 days	Start time: Current day, 7 days prior + specified time, 00:00:00. End time: Current day, 1 day prior + specified time, 23:59:59.
Last year's first half	Start time: Current year, 1 year prior + specified day, day 1 + specified time, 00:00:00. End time: Current year, 1 year prior + specified month, month 6 + specified day, day 30 + specified time, 23:59:59.
Fiscal year (the new fiscal year starts in October the current year)	Start time: Current year, 1 year prior + specified month, month 10 + specified day, day 1 + specified time, 00:00:00. End time: Current year, 0 year prior + specified month, month 9 + specified day, day 30 + specified time, 23:59:59.

Resource Migration

Last updated：2025-09-19 15:30:18

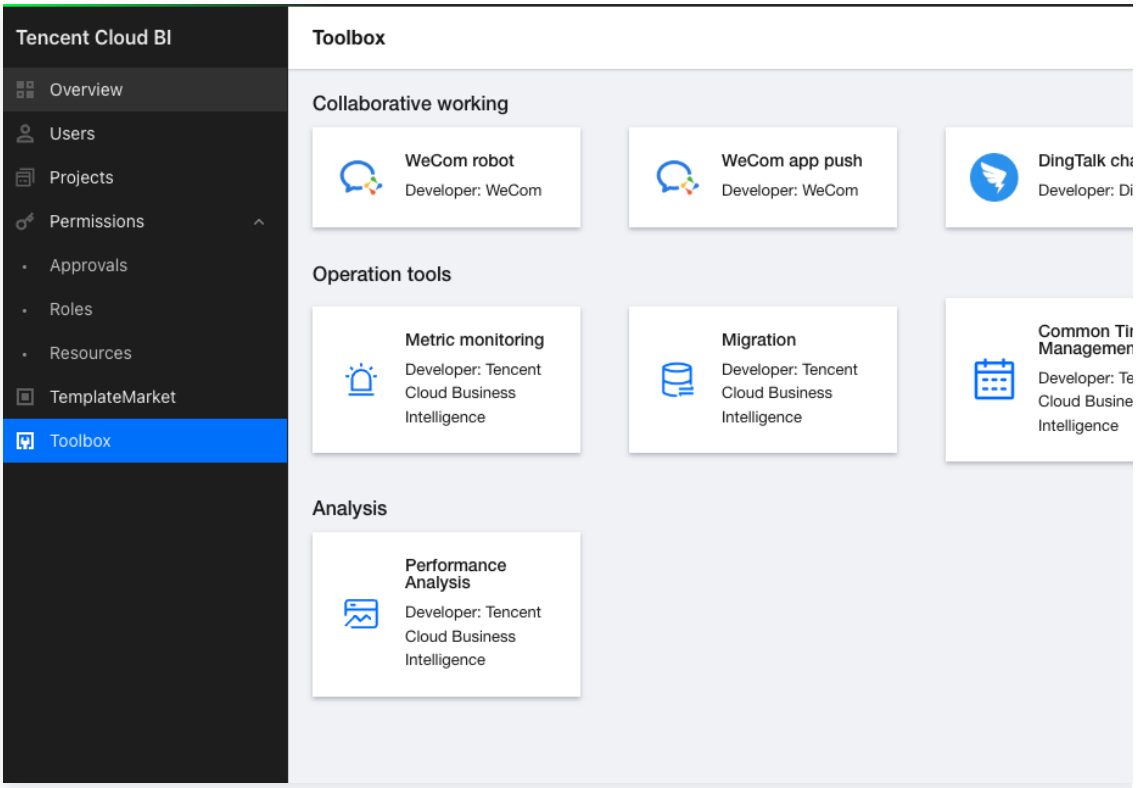
Overview

The Business Intelligence (BI) resource migration feature enables the migration of specific resources (dashboards, pages, and data) across projects, accounts, and environments. This feature supports use cases including project migration, page reuse, and resource sharing. A complete resource migration involves resource export (selecting projects, specifying resources, generating resource packages, and exporting resource packages) and resource import (selecting projects, uploading resource packages, and connecting data sources).

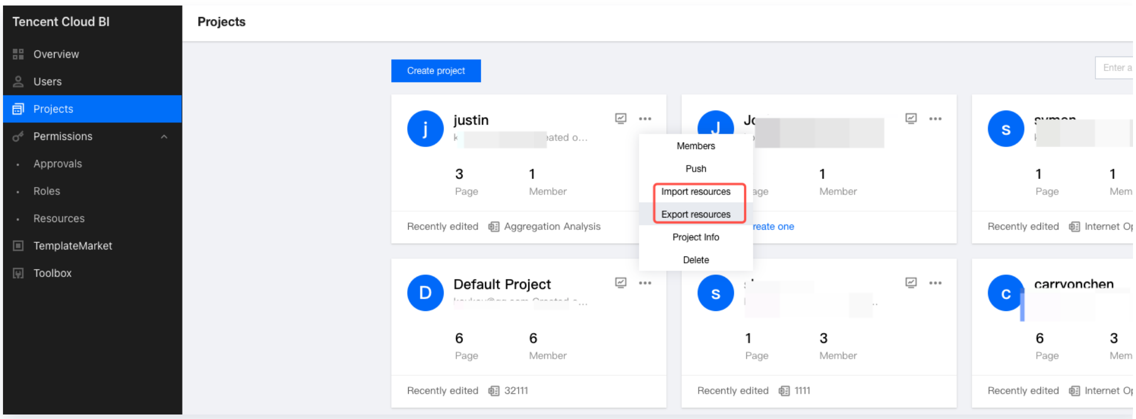
> **Feature limits:** This feature is only available to Professional Edition users. Resource migration for projects can only be performed by the enterprise administrators or project administrators.

Feature Entry

1. Go to the "Resource migration" feature in the "Toolbox".

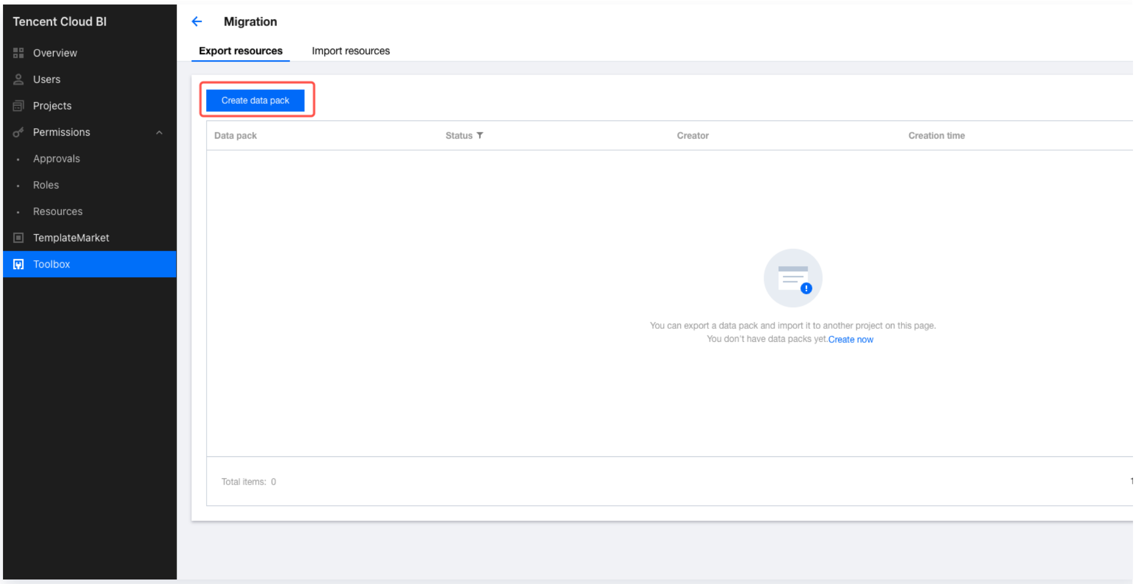


2. Select resource import and resource export through "More Operations" in the project (only the enterprise administrators can perform this operation).



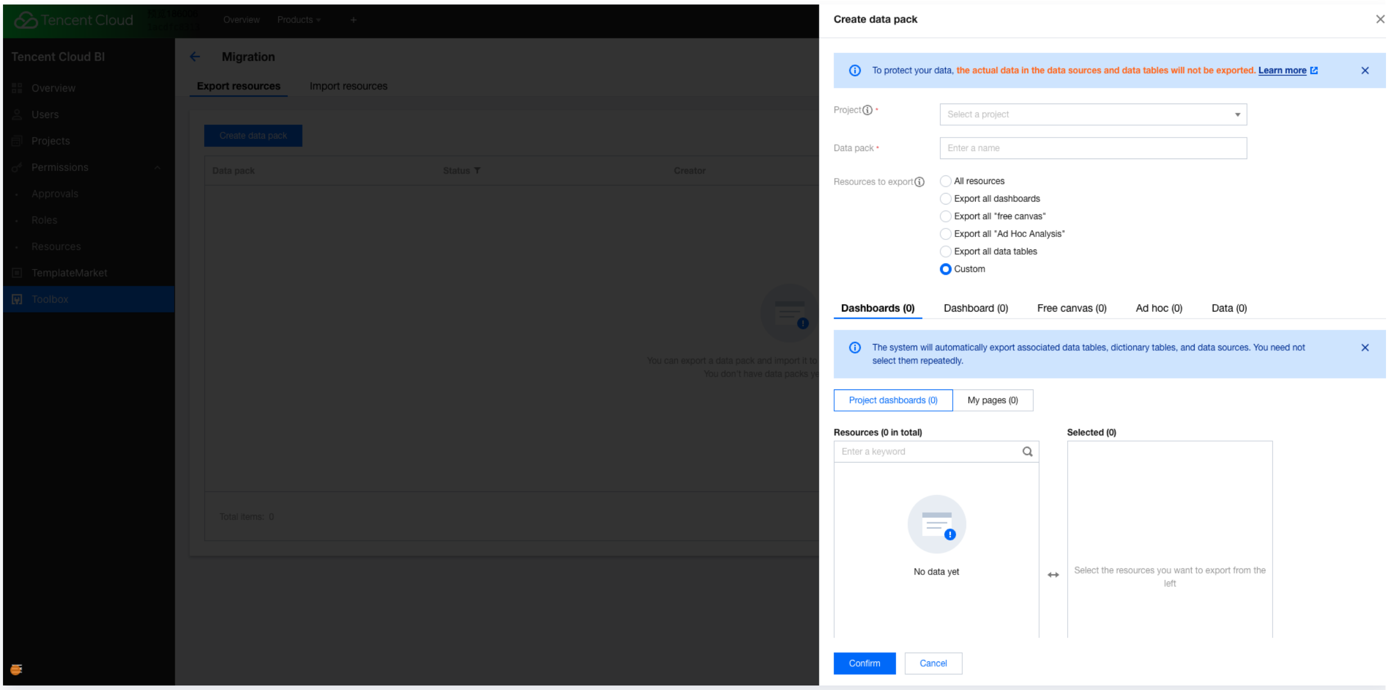
Resource Export

1. On the "Resource Export" page, click the "Create Resource Package" button.



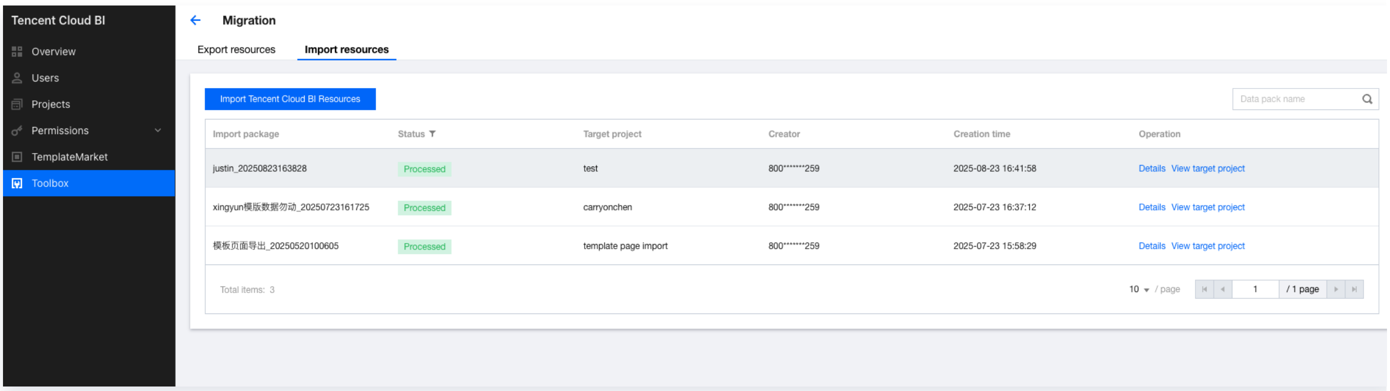
2. In the "Creating Resource Packages" pop-up window, select the method for creating the resource package. When selecting "Customize export range", you can customize the selection of resources from dashboards, pages, or data.

   To guarantee users' data security, **detailed data in the data resource will not be exported when exporting** (only export partial connection information of the data source, table structure, etc.).



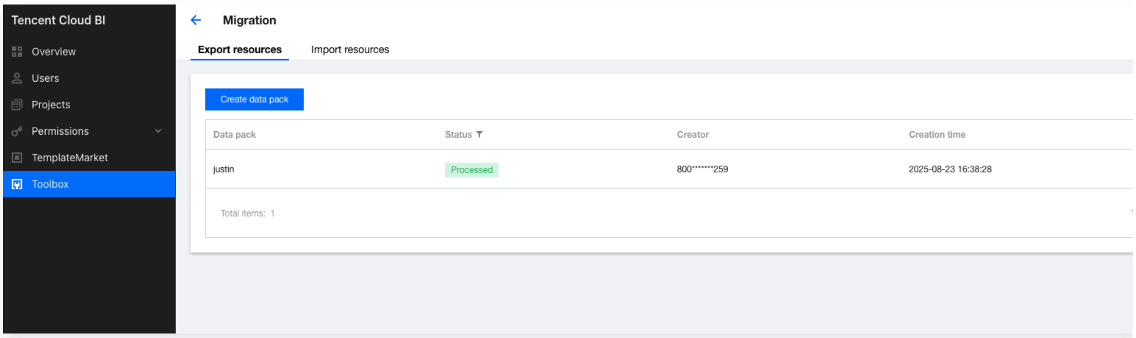
After confirming the export range of the resource package, a corresponding "Processing" record will be added to the export list. You can refresh the list to check whether the resource package has been processed. Once processing is complete, you can proceed with the download.

Note: **The downloaded file is in .zip format./** This package should be used directly for import later.



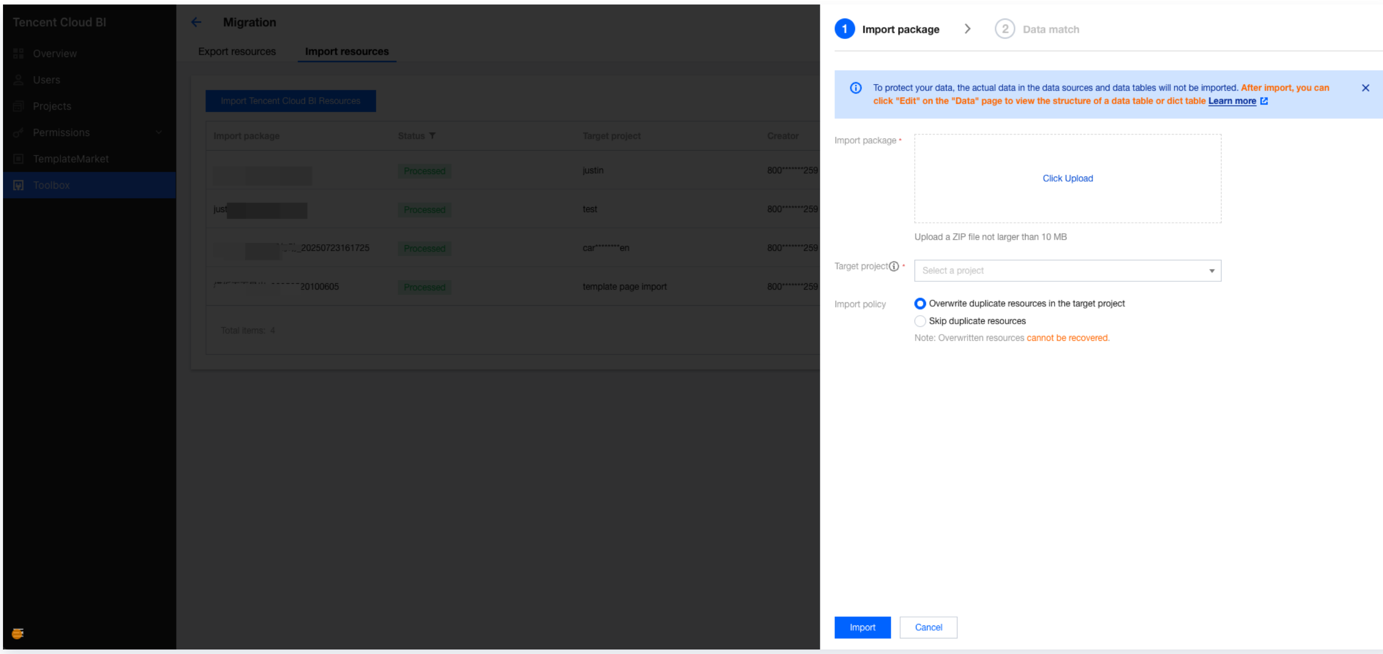
Resource Import

1. Switch to the "Resource Import" page in the toolbox to create an import task.

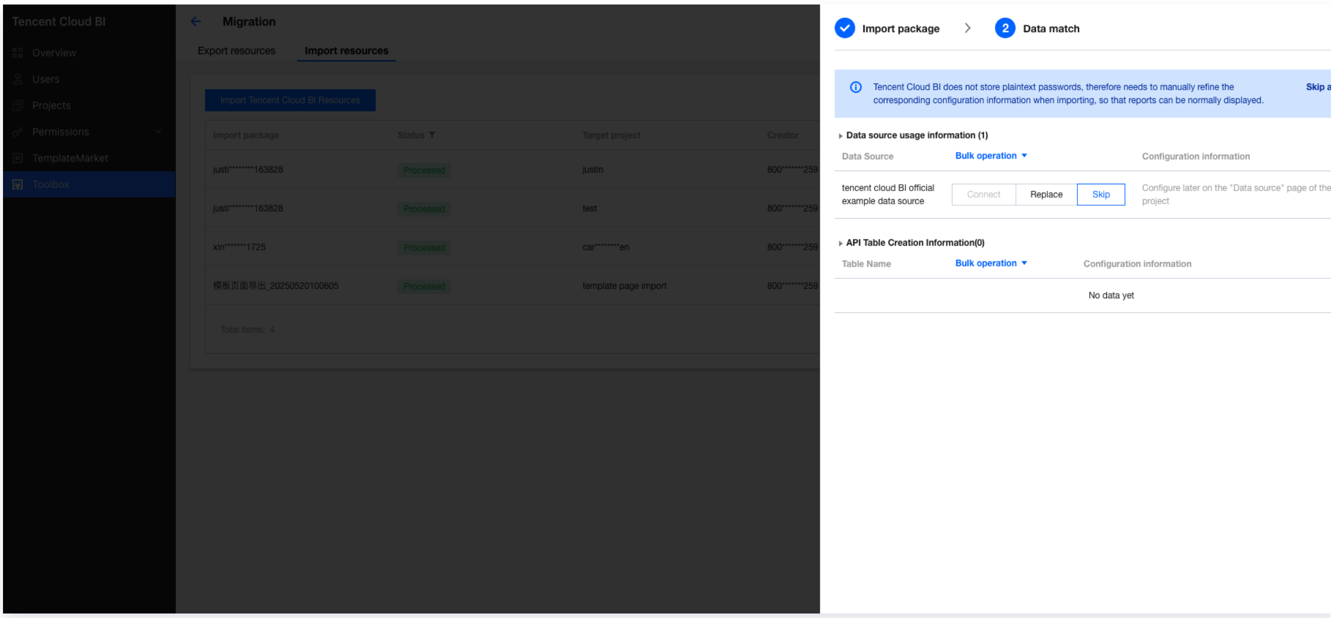


2. Upload the resource package file (in .zip format) and select the project to which the resources will be imported. Different policies are supported for handling duplicate imports.
   - Overwrite duplicate resources in the target project: If resources in the import package duplicate existing resources in the project, the package resources will be imported and overwrite the existing duplicate resources in the project.
   - Do not import duplicate resources from the resource package: If resources in the import package duplicate existing resources in the project, the duplicate resources will not be imported, and only the non-duplicate resources will be imported.

Once all fields are entered, click to start the import process.

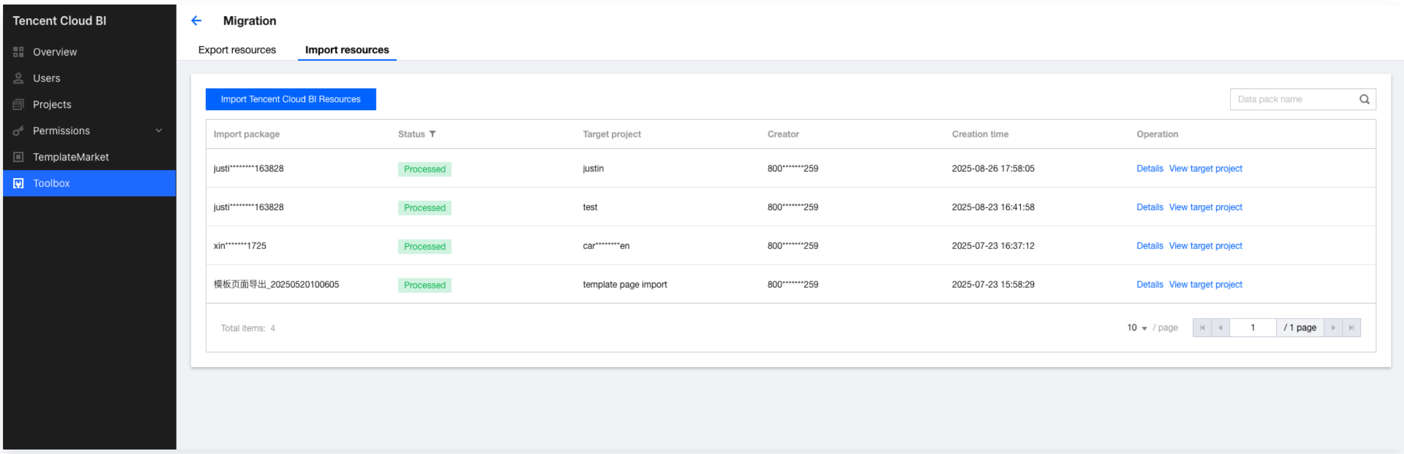


3. After the import is complete, quick data source matching is supported (choose to skip if you do not need to connect to a data source on this page for now). To ensure user data security, the exported resource package contains no important information about the data source connection. Users need to complete the missing information to restore the data connection and enable full page display. The system provides 3 methods for data source matching.
   - Connect: Enter the username and password to complete the connection information. The connection will be restored later. This method is suitable for proprietary data sources (cloud data sources typically require more complex configurations for connection and are only supported by the "Replace" or "Skip" methods).
   - Replace: Select an existing data source in the project to replace. After replacement, all pages, data tables, and dictionary tables that reference the original data source will be updated to reference the new data source. This method is recommended when an existing data source in the project closely matches the one in the package.
   - Skip: Skip connection and replacement at this stage. Import the data source information from the package to the project first. You can edit and connect the data source later within the project.



Import Result Viewing

When the import is successful, the import record status will be "Processed". You can view the import results through project management or the "View Target Project" quick action.



FAQs

1. What should I do if the error "Data source connection exceptions (including incomplete connection information, inaccurate connection information, and network issue)" occurs when viewing pages or data after import?

   Common causes include incomplete data source connection after import or mismatches between tables in the new data source and the table fields in the BI system, resulting in data connection exceptions. It is recommended to verify whether the data source information is accurate, the connection is functioning properly, and all required fields are included.
2. After import, if the new data source cannot fully match the data tables in BI and cannot be modified, how can the page display be restored?

   It is recommended to edit or create data tables within BI to adjust the fields. Then, go to the report editing page and adjust the corresponding components referencing the relevant tables by dragging and dropping the relevant fields in the dimension, metric, and other areas again.
3. After import, if the uploaded Excel data tables or dictionary tables appear empty, how can I recover the data?

   In the data table list, tables sourced from Excel or Tencent Documentation support the "Update" operation, allowing users to upload data in the same format to complete or update the table data. (This capability will also be supported for dictionary tables in the future.)
   To view the table structure (to check the fields included) of a specified data table or dictionary table for generating corresponding files, select "Edit" on the corresponding data table or dictionary table.
4. How to resolve the processing failed error caused by an incorrect format during import?

   First, ensure that the uploaded file format is correct. You need to upload the original .zip file exported from the platform.
   If the initial upload fails, try exporting and importing the resource package again. If the issue persists after multiple attempts, contact us through customer service from our official website.