Visual BI Value Driver Tree for SAP Lumira Designer

- Release Notes -

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www.visualbi.com
solutions@visualbi.com
Phone: +1 888-227-2794
Fax: +1 888-227-7192
Plano, TX ■ Dallas, TX ■ Chennai, India

2   Introduction

2.1   Document History

This document is valid for the releases shown in the table below (see Table 1):

Major Release	Minor Release	Patch	Date
2	**0**	**0**	**December 2017***
2	0	5	July 2018
2	0	6	October 2018
3	**0**	**0**	**February 2019***
3	**1**	**0**	**April 2019***
3	**2**	**0**	**September 2019***

Table 1: Document History

2.2   Who Should Read This Guide?

The Release Notes Guide for the Visual BI Value Driver Tree for SAP Lumira Designer (VDT) offered by Visual BI is meant for users that are going to use Apps leveraging the Value Driver Tree Extension to analyze value driver relationships, compare versions such as Forecast vs Current Budget and simulate what-if scenarios such a change in price, volumes and efficiencies real-time.

3 What's new in Release 3.x

In the following sections, we will outline the new features and functionalities of the release 3.x.

3.1 Release 3.2

In the following sections, we will outline the new features of the release 3.2.

3.1.1 Scenario data in writeback

You have the ability to export the Scenario Data using the Writeback Functionality.

3.1.2 Initiative data in writeback

You have the ability to export the Initiative Data using the Writeback Functionality.

3.1.3 Scenario data in output data source

You have the ability to export the Scenario Data in the output data source.

3.1.4 Selection of Initiatives

The specific Initiative under a Scenario can be selected in the Navigation Panel using the check box.

3.1.5 Prior Period in Formula

You have the ability to insert the Prior Period Formula for the Node by navigating to the Area Calculation in the Tree Tab.

3.1.6 Initiatives in compare scenarios

By clicking the option "Compare Scenarios in collection" in the Navigation Panel, you will be able to view the Initiatives in Full Year Scenario Comparison page that are part of the specific Scenario.

3.1.7 Initiatives in waterfall

You will be able to view the Initiatives Breakdown in the Waterfall Chart that appears in the Detail Page.

3.1.8 Scenario Export with second level Initiatives

You will be able to export the xml report which involves the scenarios with second level Initiatives.

3.1.9 Switch to Node detail from compare scenarios

You will be able to switch down to any Node details from the compared scenarios and the same can be viewed in the Comparison Page.

3.1.10 Change waterfall type at runtime

You will be able to change the waterfall chart type in the runtime as "Vertical" or Horizontal" type.

3.1.11 Maximize chart at run time

You can view the Waterfall Chart in full screen.

3.1.12 Grouping (Variance Breakdown) in detail page

When the number of groups is more than 8 counts then it will be categorized and the Variance Breakdown in the waterfall chart will get displayed accordingly.

3.1.13 Scripting Properties for the VDT Component

1. simulateNodes() – It allows you to set the simulation for the Nodes.
2. simulateScenario() - It allows you to set the simulation for the specific scenario.

3.1.14 Adding Comments at Node Level

Comments can be added as part of either Scenario / Initiatives.

3.1.15 Collaboration API

It provides the Backend Code and Demo Server details.

3.1.16 IBCS Chart in Trend Analysis

A new Chart type "IBCS Chart" has been added for the Node details.

3.1.17 Data Merge

VDT comes with a data merge component for append operations and VBX data merge component also can be used for advanced operations.

3.1.18 Other Minor Features

The other minor features have been listed below:
1. Node level conditional formatting
2. German Language Support
3. Sample VDT from cdn - can be used for "Demos"
4. Color picker for status (Red, Amber, Green and Black)
5. Customize links - line style and color

3.2 Release 3.1

In the following sections, we will outline the new features of the release 3.1.

3.2.1 Tooltip

You have the ability to activate the Tooltip display for each Node where it shows the Time Aggregation and Formula.

3.2.2 Search in Value Driver Tree

Using this Search option, you will be able to search the Node based on the Node ID or Node Title in run time.

3.2.3 Search in Navigation Panel

Search option with Pin Feature has been included in the Top Node section, Key Assumption Section and Key Performance Indicator Section in the Navigation Panel.

3.2.4 Search in Additional Properties Sheet

Using this Search option, you will be able to search the Node based on the Node ID or Node Title in design time.

3.2.5 Waterfall Type

In Node Detail page, you will be able to configure the Waterfall Chart Type as Horizontal or Vertical.

3.2.6 Children Count

You will be able to visualize the total count of children when a specific Node is collapsed.

3.2.7 Scripting Properties for the VDT Component

1. DisablePeriods() – It restricts "n" number of periods from simulation.
2. SimulateNodeManually() – It allows you to set different values manually for each simulation period.
3. SimulateNode() – It allows you to set the percentage value for all the simulation periods.

3.2.8 Quick Editor

Using the Quick Editor option in the Tree Tab, you will be able to view the entire Tree Hierarchy in a Grid View.

3.3 Release 3.0

In the following sections, we will outline the new features of the release 3.0.

3.3.1 Negative Value Format

A new property Negative Display has been added to configure the Number format which gets displayed in the Node of the VDT.

3.3.2 Visualization

You have the ability to configure the Table Style and Node Style using the properties Default Table Style and Default Node Style.

3.3.3 Enable Tree Editing in Runtime

You will be able to edit the Nodes in the Tree by enabling the property Enable Tree Editing at Runtime.

3.3.4 Templated Nodes

Using this option, you can create a Templated Node for the already existing Node. It is very specific that the Templated Nodes should not map the Parent Node.

3.3.5 Enable Fixed Value List (Enum option)

You can use Enum option which contains a set of named constants and those named constants can be represented in the Node.

3.3.6 Dimensional Node Component

As a Dimensional Node Component, now you have the option to assign the Data Source at the Node Level for further simulation.

3.3.7 Detail Page Component

A new Detail Page Component has been included which is used to show a Custom Detail Page in the Run time instead of the Standard Page. The Custom Detail Page has the following features

3.3.8 Single Data Series

You will be able to configure the VDT Tree with the different set of Data Series options as listed below:
- Primary Data Series only
- Primary Data Series with Comparison Data Series
- Single Data Point
- Single Data Point with Comparison

3.3.9 Variance Analysis

A new option Variance Breakdown has been included in the Run time which shows the complete variance breakdown of the Calculated Components on the Full Period.

3.3.10 Dynamic Tree from Data Source

You will be able to use Hierarchical Data Source for the Value Driver Tree. Based on the Hierarchical Data Source assigned the VDT will show the Parent and the Child Nodes in relevance to the Additional Property settings.

3.3.11 CSV Data Source

You will be able to use CSV Data Source for the Value Driver Tree as part of the Data Source configuration .

4 What's new in Release 2.x

In the following sections, we will outline the new features and functionalities of the release 2.x.

4.1 Release 2.0.6

The performance issue with the Navigational Panel for the Value Driver Tree on Lumira Designer 2.2 has been fixed in the VDT Release 2.0.6.

4.2 Release 2.0.5

The following enhancements were implemented in the VDT Release 2.0.5.
- Scale Suffix
- Formatting of Numeric Values
- Write simulation results to underlying systems
- Value Driver Tree result as Data Source
- Excel as Data Source
- Export Config
- Edit Scenario and Description

4.3 Release 2.0

In the following sections, we will outline the new features of the release 2.0.

4.3.1 Tree Drill Down

The tree drill down will focus on the branches that are being expanded. You can collapse any specific node by clicking the '<' collapse button on the right of a widget.

4.3.2 Zoom and Pan

Value Driver Trees can be large. You can zoom and pan the canvas view. If you are using an iPad or iPhone, you can zoom by pinching and pan by dragging the same way you would navigate a map.

4.3.3 Value Display and Simulation Period

With the 'Value Display' functionality you can choose the time aggregation you want to display as the primary value. The designer can link certain nodes to a user selected scaling. You can select the scale you wish to display by selecting this under the Value Display section.

4.3.4 Value Driver Tree views - Filters

If your Value Driver Tree is large, the designer may have defined specific sub views. These would be listed under the Value Driver Trees Section of the Navigation Panel. When clicking on of these views, the tree will be filtered and the specific node will be made the top node.

4.3.5 KPIs

The Navigation Panel can be configured to list a set of KPI's from the value driver tree. You are able to navigate to each of them for a fast view on the simulation impact on a given KPI.

4.3.6 Data Simulation

Two different Data Simulations have been added in VDT.

4.3.7 Key Inputs

Key Inputs is available on the left side panel to directly simulate key cost drivers without going into the node details.

4.3.8 Scenario Comparison

You can create multiple scenarios in parallel, compare them as well as sharing the collection with others.

4.3.9 Constraints

Constraints are also available in the left side panel that identifies the metrics that are overcapacity (highlighted in RED fonts) or still have opportunities for further improvements (highlighted in WHITE fonts).

4.3.10 Understanding Variances

The starting point for a simulation is a selection of two versions - **Primary Version** and a **Comparison Version** and a year. For instance, a forecast vs current budget. Once we start simulating, changes are applied to the primary version. We call this changing version the Simulation.

4.3.11 Understanding the Node Widget Information

The Node Widget for a Value Driver displays key information such as value, variance, simulation impacts and trend without having to navigate further.

4.3.12 Conducting what-if analysis

One of the main aspects of the Value Driver Tree is to be able to simulate the impacts changes to key drivers such as prices have on the full year forecast. As we can't change the past, such a simulated change should only be applied to future period. The App have this capability. When performing what-if analysis, the period that a simulation should be applied from is selected in the Side Panel.

4.3.13 Getting more information about a Value Driver

If you click on a node Widget, a detail screen is displayed with additional information on the selected node.

4.3.14 Saving and Opening Scenarios

The standard Value Driver Tree App template contains functionality for saving and opening a scenario collection.

5 Known Issues

5.1 Release 2.0

Below are the known issues as of the writing of the document. This list will be updated in the online version to reflect the current state at any point in time.

Known Issues	Description
Pinch zoom is not supported in IE on Windows touch enabled devices	The Pinch zoom doesn't work within Windows touch interfaces. A zoom slider has been added to ensure users has access to zoom even when
Value Driver Trees tested up to 1500 nodes in single tree	As your tree becomes bigger, the most likely challenge becomes your data source performance. As the data source is not refreshed during navigation, this major performance impact is however only material when you open the App. It is a little like opening an Excel workbook. As they become larger, they take longer to load. Value Driver Trees are tested up to 1500 nodes and calculation, visualisation and simulation is almost instant on all tested devices. We can however not guarantee performance beyond our tested level. If you have a requirement for more than 1500 nodes in a single tree, please contact us.

6   Further Information

You can find further information about the Visual BI Value Driver Tree for SAP Lumira Designer here:

User Guide:
http://cdn.visualbi.com/wp-content/uploads/visualbi-value-driver-tree-user-guide.pdf

Installation Guide:
http://cdn.visualbi.com/wp-content/uploads/visualbi-value-driver-tree-installation-guide.pdf

Supported Platforms:
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www.visualbi.com
solutions@visualbi.com
Phone: +1 888-227-2794
Fax: +1 888-227-7192
Plano, TX ■ Dallas, TX ■ Chennai, India