



## **Visual BI Explorer for SAP Lumira Designer 2.1**

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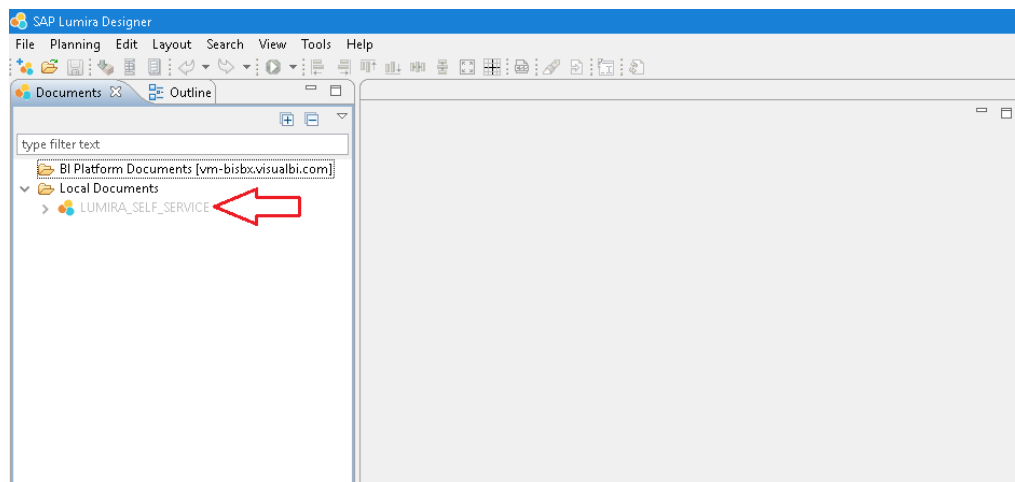
Phone: +1 888-227-2794

Fax: +1 888-227-7192

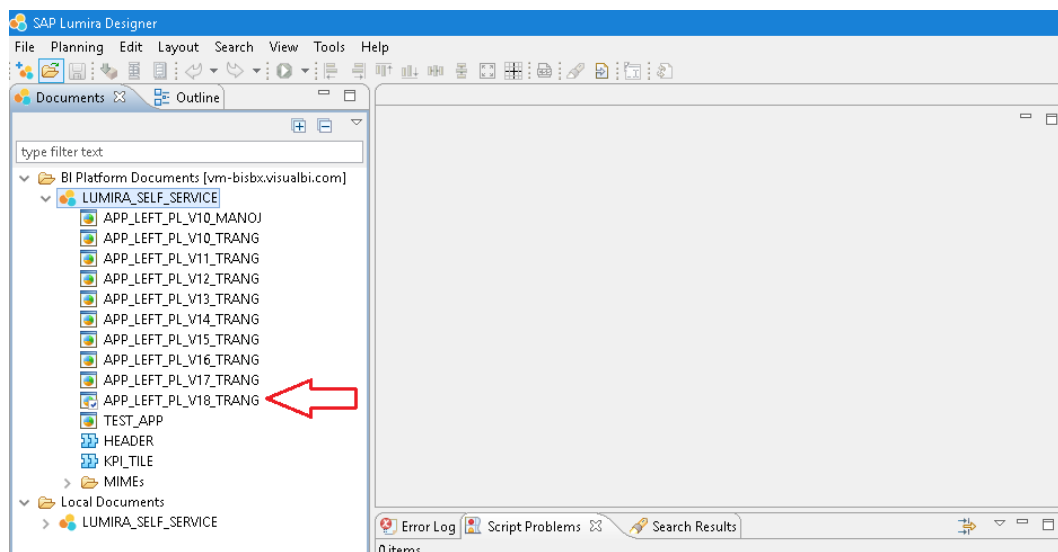
Plano, TX ■ Dallas, TX ■ Chennai, India

## 2 Uploading the document

1. Copy the LUMX file to SAP Lumira Documents Folder under your documents.
2. Open Lumira Designer. Now, the file you pasted under SAP Lumira Documents folder is listed under Local Documents.

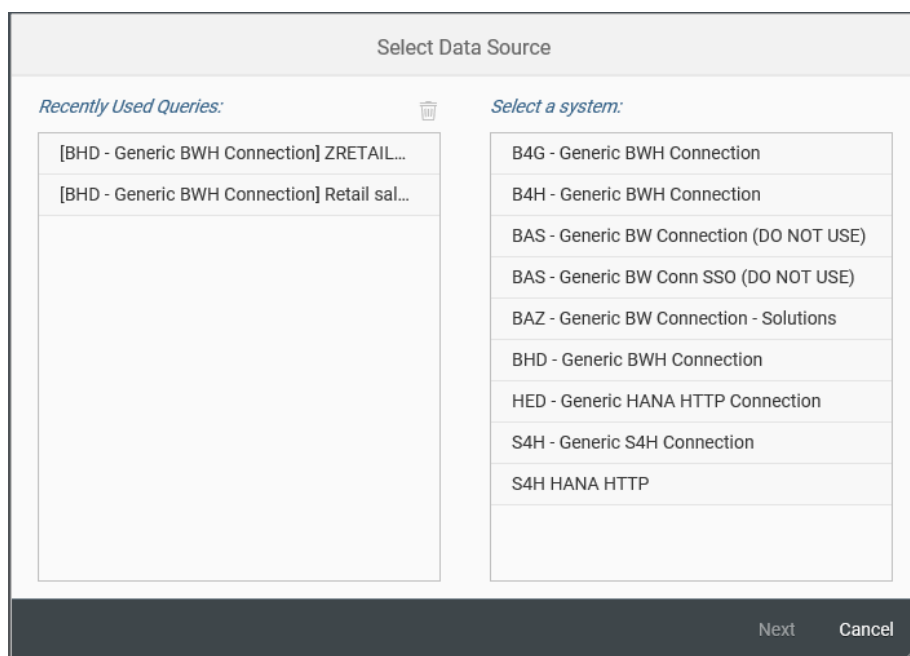


3. Right click on the desired document and select Upload to BI Platform.
4. Choose the folder location where the document must be placed and enter a name for the application. Click OK.
5. The Lumira Document will now be created under BI Platform Documents. Double click on an application to open it.
6. The Application with the checkbox is the default application. To set an application as the default, Right click on the application and select Set as Default.

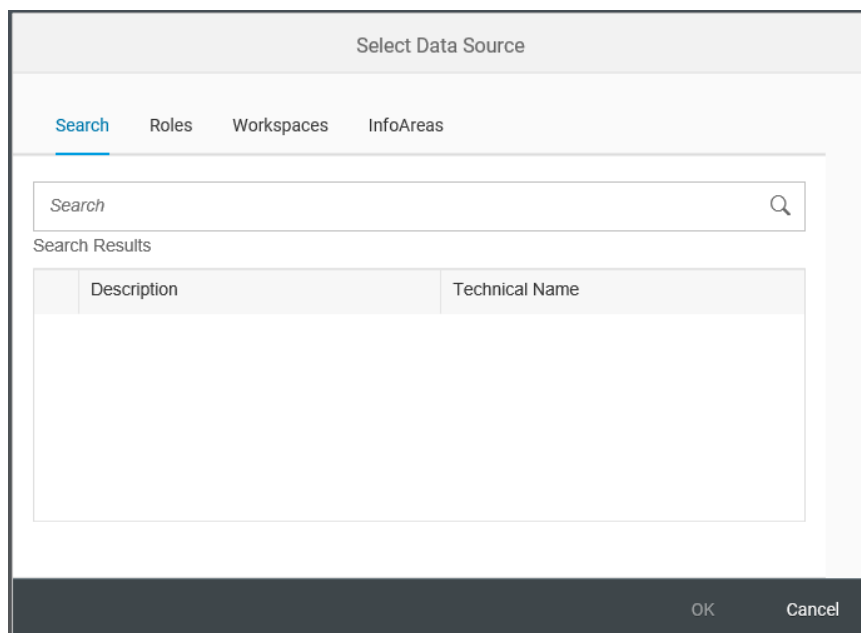


### 3 Selecting a Data Source

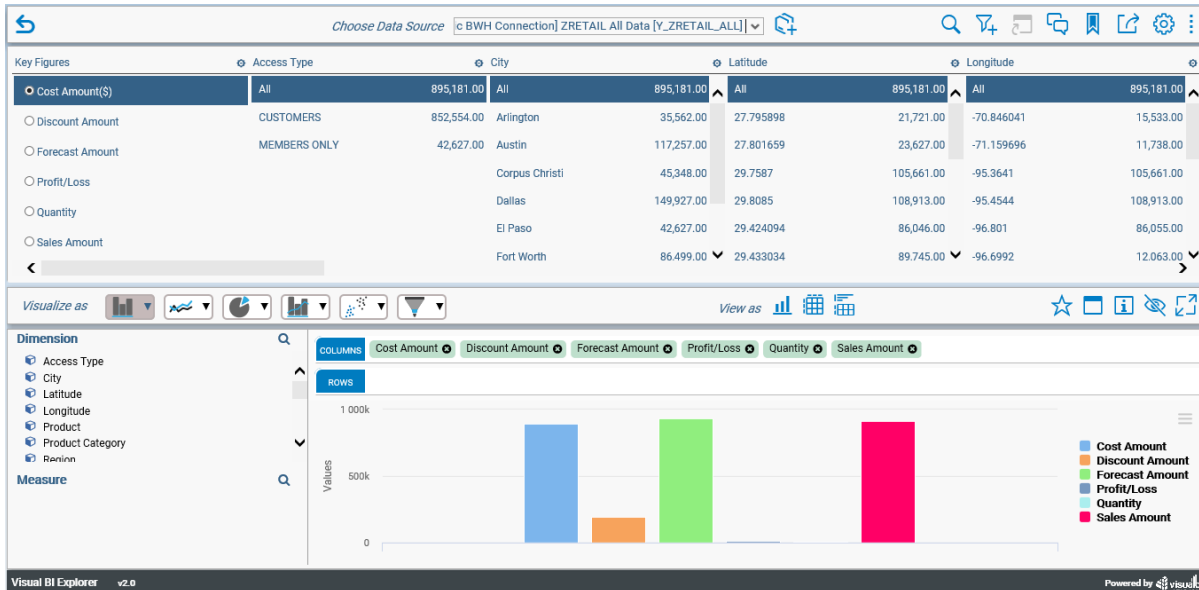
1. Initial screen of VBI Explorer 2.0 prompts a Select Data Source widow.
2. Choose a connection from a list of available BW or HANA systems displayed or choose one of the recently used Queries that are displayed.



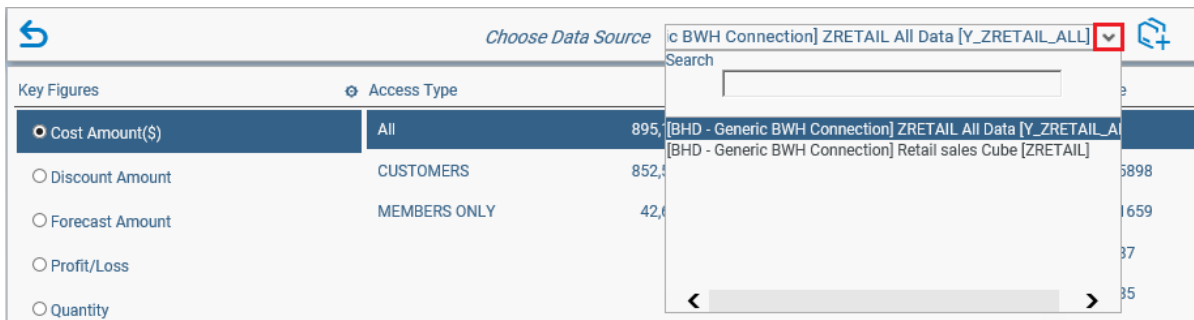
3. If one of the recently used Queries has been selected, then the dashboard renders with the Query data directly.
4. When BW or HANA connection has been selected in the initial screen, it directs to the next window prompting to choose Query or View from selected system.



5. Search for the Query or View either by expanding its corresponding Info Areas or by Workspaces or by Roles or directly type in the Query/View name in the Search box.
6. The dashboard gets rendered with the selected Data Source data.

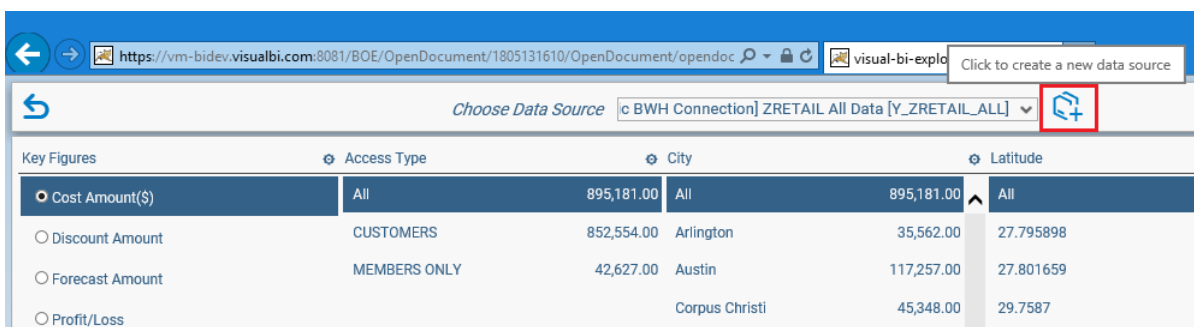


7. To select any previously used Query/ View as Data Source after the dashboard has been rendered, click on the drop-down icon for 'Choose Data Source'.



8. Choose one of the Queries from the drop-down list and dashboard gets rendered with the chosen data.

9. In order to choose any new Query/View again, click on the Create New Data Source icon.



10. Now Select Data Source selection screen gets popped and repeat Steps from 2-5.

## 4 Working with the Facets View

1. Facets View helps users to view all the Dimensions available in Query and its corresponding Key figures.

Key Figures	Access Type	City	Store Type	Latitude
<input checked="" type="radio"/> Cost Amount(\$)	All	895,181.00	All	895,181.00
<input type="radio"/> Discount Amount	CUSTOMERS	852,554.00	Arlington	35,562.00
<input type="radio"/> Forecast Amount	MEMBERS ONLY	42,627.00	Austin	117,257.00
<input type="radio"/> Profit/Loss		Corpus Christi		45,348.00
<input type="radio"/> Quantity		Dallas		149,927.00
<input type="radio"/> Sales Amount		El Paso		42,627.00
		Fort Worth		86,499.00
			RETAIL	831,309.00
			WHOLESALE	63,872.00
				27.795898
				27.801659
				29.7587
				29.8085
				29.424094
				29.433034

- For Key Figures, by default first measure is selected. Users can switch between the available measures and the corresponding values gets reflected against the Dimension.
- For Dimensions, by default All (Total summation) is selected and its measure value is displayed against 'All'. Users can select any of the Dimension members and this selection gets reflected on all other Dimensions available in the Facet view.
- Users can navigate through the Facet view to see all Dimensions and its measure values.
- A setting icon is available on the top right corner of Key Figure and Dimension tiles. Click on this icon to sort the Dimension/Measure values. A search box is available to filter any specific Dimension/Measure values.
- Any filters that are applied in the Facet view will be reflected in the Chart view as well.

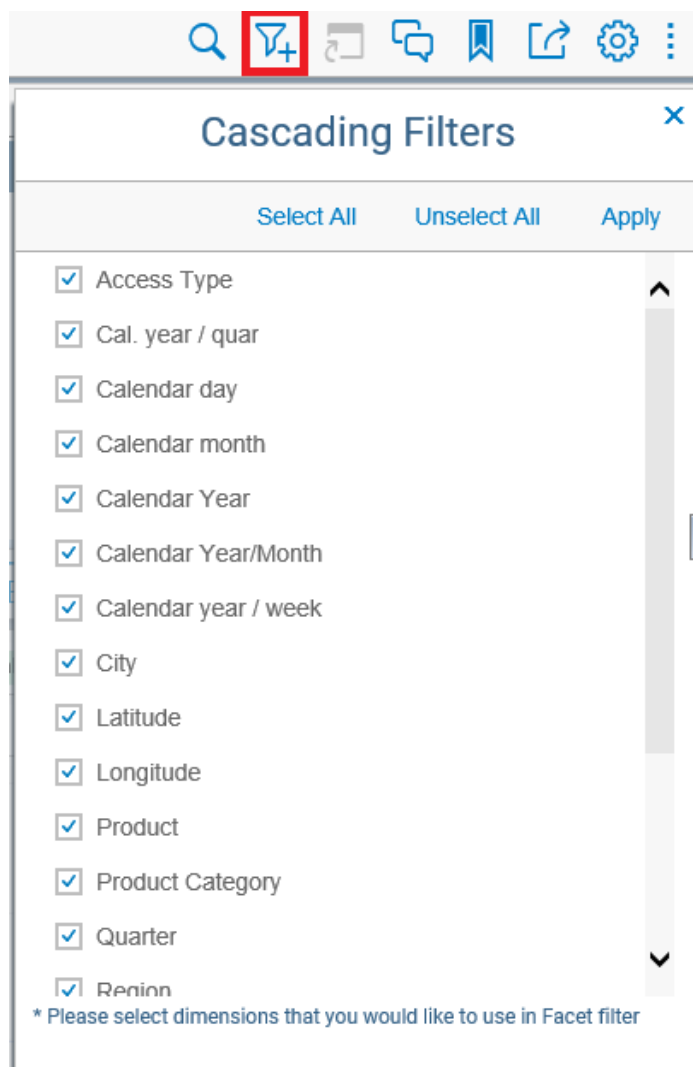
Key Figures	Access Type	Value
<input checked="" type="radio"/> Cost Amount(\$)	All	895,181.00
<input type="radio"/> Discount Amount	CUSTOMERS	852,554.00
<input type="radio"/> Forecast Amount	MEMBERS ONLY	42,627.00
<input type="radio"/> Profit/Loss		
<input type="radio"/> Quantity		
<input type="radio"/> Sales Amount		

Sort	Search
<input checked="" type="radio"/> Ascending	
<input type="radio"/> Descending	
	Search...

## 5 Cascading Filters

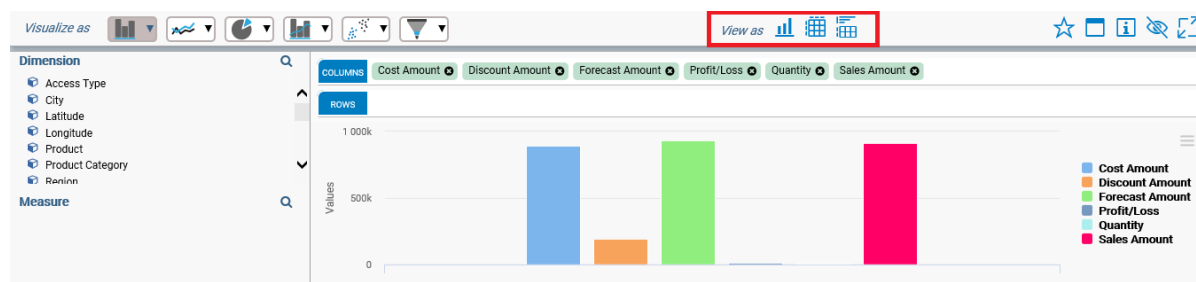
1. Users can select or deselect the Dimensions that can appear in the Facet view.
2. Click on the Add / Remove Dimension filter icon that is available among the icons on the top right corner of the dashboard.
3. Users can either click on Select All / Deselect All dimensions or manually check / uncheck the checkbox against each Dimension.
4. Once done selecting the desired Dimensions, click on Apply.
5. Only the selected Dimensions appear on the Facet view.



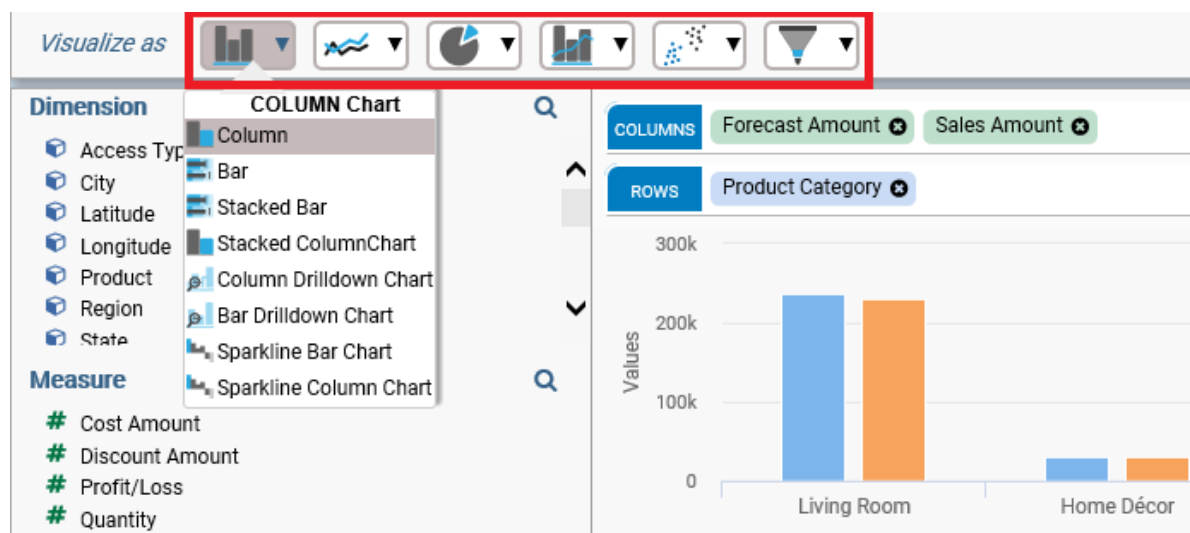


## 6 Working with the Chart Views




- There are three types of visualization available in the Chart view,
  - View as Chart
  - View as Table
  - View as both Table & Chart
- Users can choose any of the visualization types by Selection one of the desired View As icons.






- On the left side of the Chart view, users can find the Dimension & Measure navigation panel.
- Users can add/remove Dimensions from the Rows sections and add/remove Measures from the Columns sections. The chart gets displayed with the added Dimension and Measure values.
- Chart selectors are available on the top left corner of the Chart view.



- There are six Chart categories available in the Chart selectors.
- Click on the drop-down arrow and choose the desired Chart type from the list available for each Chart category.
- In Table view, Search box is available to filter on any specific Dimension members.

View as   

**COLUMNS** Forecast Amount  Sales Amount 

**ROWS** Product Category 

room






Product Category	Forecast Amount	Sales Amount
Living Room	235,880.00	229,750.00
Bedroom	232,110.00	227,117.00

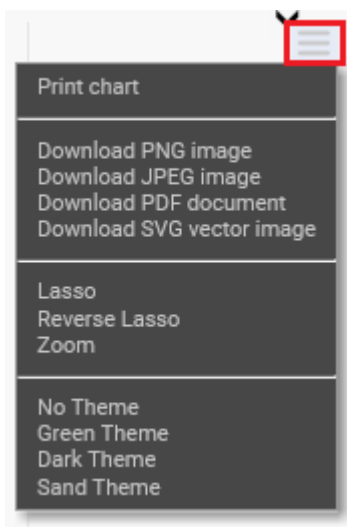
9. Basic chart functionalities like Zoom and drill down can be performed on the Charts based on the type chosen.
10. Legends will be displayed on the right side of the Chart. Users can click on the Legend members to view only the selected members on the Chart View.
11. Export options are available for Charts to Print or Download the Chart and to perform Zoom, Lasso and Reverse Lasso on Chart.
12. Menu options are available for Tables with various options available – Pin Column to Table, Filter Table values or select Measure values to display.

## 7 Customizing Chart Views

- Five shortcut icons are available at the top right corner of the Chart view.



- The icon  is used to make the Chart view as default view. Clicking on this icon displays a prompt dialog box asking the user to confirm if the current view needs to be made default or not.
  - The icon  is used to change Chart Titles. Click on the icon and edit the text box with the desired title.
  - The icon  prompts a message window with information about the Chart like Chart type and the prerequisites to use the chart.
  - The icon  allows users to hide or show the navigation panel (Dimension and Measure navigations) present in the Chart view.
  - The icon  allows users to expand the Chart View area to fit the entire dashboard area and to refit to the original size.
- Users can change the theme for the Chart by clicking on the Export options available at the top right corner. Select any theme from the available themes or select No theme to remove theme for chart.



## 8 Search & Select Functionality

1. Users can search for any particular member they would like to filter and see on the Facet view.

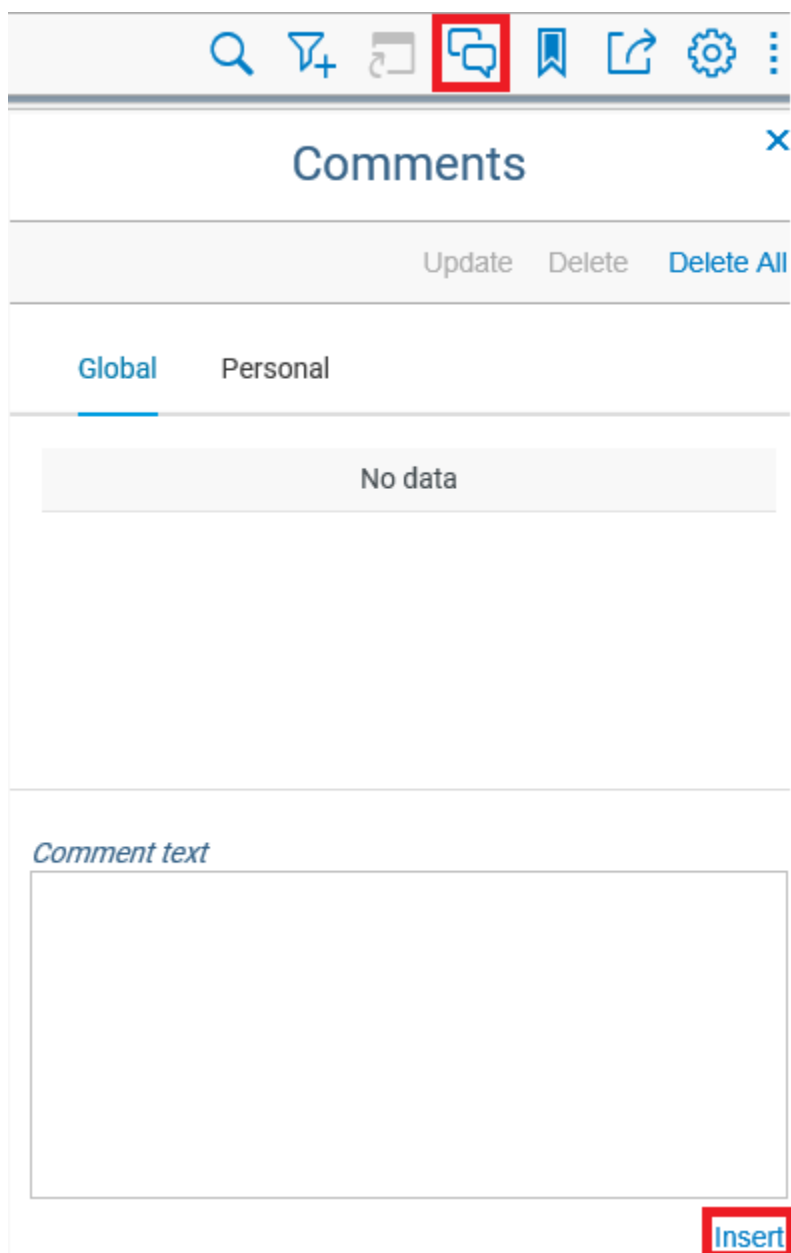
City	Store Type
All	6,520.00
Austin	4,500.00 RETAIL
Corpus Christi	2,020.00

2. The search icon is available among the icons on the top right corner of the dashboard.
3. Click on the icon and search to find any member and Click on Search.
4. The searched member will be filtered for that particular Dimension under Facet view and the same will be reflected in the Chart view as well.
5. Users can search for multiple members by entering each member separated by semicolon.

City	
All	4,500.00
Austin	4,500.00

## 9 Commentary Functionality

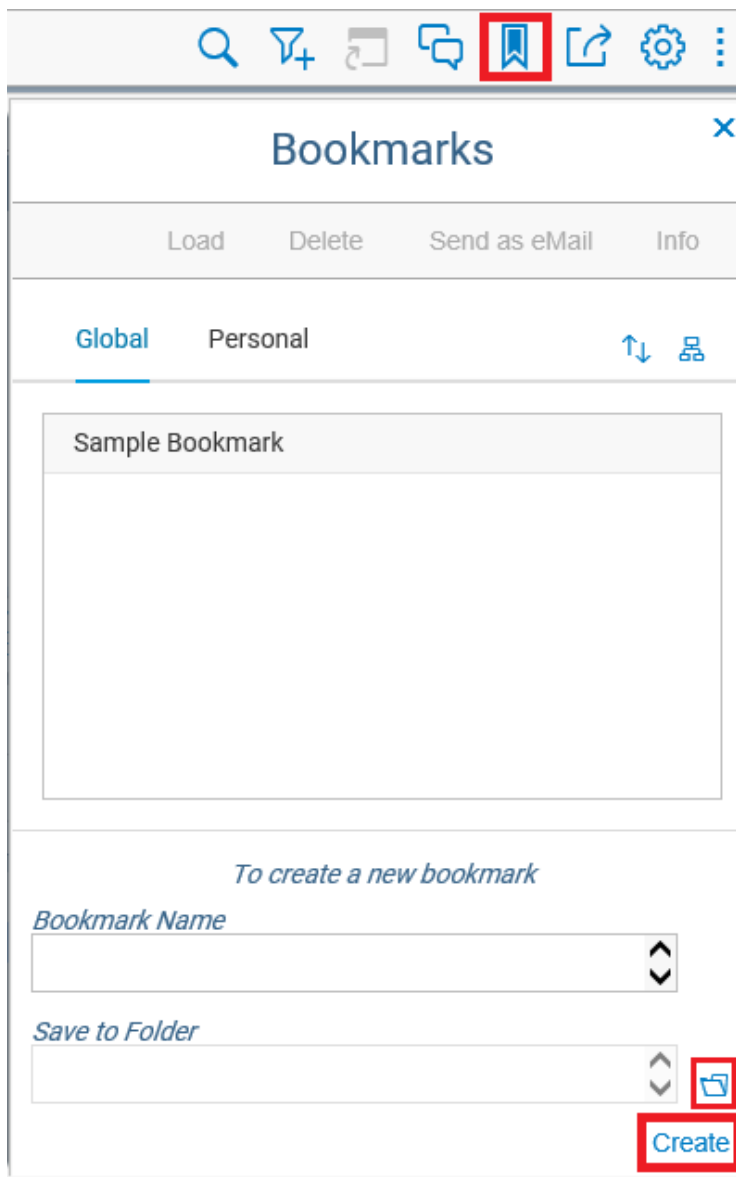
1. Commentary functionality allows users to add notes either globally or personally.



2. Click on the Comments icon available on the top right corner of the dashboard.
3. Enter the comments in the text box and click on Insert to post the comment.
4. To post the comments publicly, enter comments under Global tab and to enter comments personally, switch to Personal tab.
5. Users can Update or Delete a comment by selecting the particular comment and clicking on Update or Delete.
6. Click on Delete All to delete all the comments that has been posted.

## 10 Bookmarking Functionality

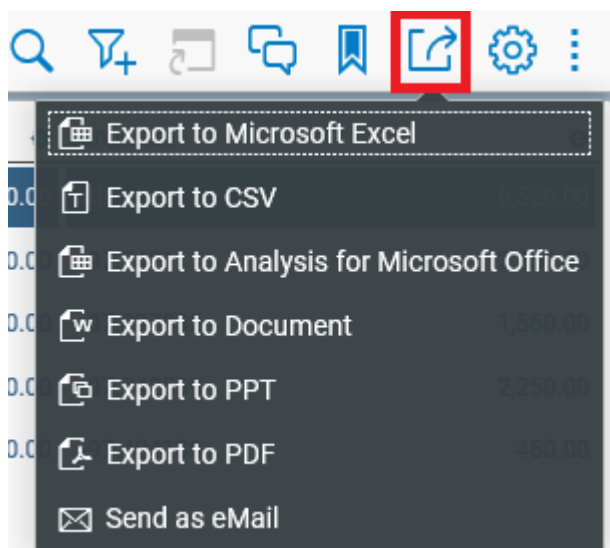
1. Bookmarking functionality allows users to save the changes made to the dashboard like filters applied, chart types and customizations.



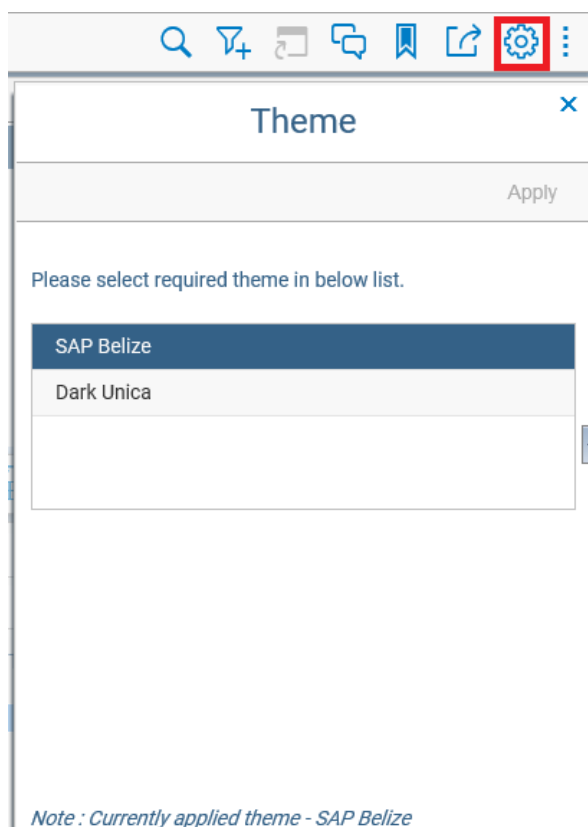
2. Make the desired changes to the dashboard and click on the Bookmarks icon on the top right corner of the dashboard.
3. Enter Bookmark Name and click on the folder icon to select the folders available on the BI platform to save the bookmark and click on Create.
4. When users close the connection or switch to other data sources and renders the Data source for which bookmarks have been created, the saved Bookmark can be selected and click on Load to apply the changes to the dashboard instantly.
5. Bookmarks created under Global is available for public use whereas bookmarks created under Personal can be used only by the user who created the bookmark.
6. Select the Bookmark and click on Delete to delete the saved bookmark and click on Send as email to share the bookmark via mail.
7. Click on Info to get a message prompt displaying the details about the bookmarks.

## 11 Export & Other Functionality

1. The Export icon allows users to export the dashboard to multiple formats like Excel, CSV, PDF, PPT or word.



2. The Themes icon allows users to change the theme for the dashboard. The default theme that is applied to the dashboard is SAP Belize. Select from the available themes and click on Apply to change the theme of the dashboard.



3. The More option allows users to view the list of shortcut keys available and to display additional information about the dashboard.

? List of shortcut Keys

i Additional Information

### Shortcut keys

CTRL	+	ALT	+	B	: Opens Bookmarks
CTRL	+	ALT	+	C	: Opens Comments panel
CTRL	+	ALT	+	F	: Opens Filter panel
CTRL	+	ALT	+	I	: Shows additional information
CTRL	+	ALT	+	N	: Opens data source browser
CTRL	+	ALT	+	P	: Opens prompt screen if available
CTRL	+	ALT	+	S	: Opens search

Close

### Data Source Information

**Query**  
ZRETAIL All Data [Y\_ZRETAIL\_ALL]

**InfoProvider**  
Retail sales Cube [ZRETAIL]

**Last Data Update**  
2/25/16 6:01:21 AM

**Last Changed**  
6/1/18 6:09:37 AM

**Last Changed By**  
DINESHKUMARB

**Last Refresh**  
6/1/18 9:02:57 AM

Close



## 12 Prerequisites & Limitations

1. Need VBX 2.3 version.
2. Need Lumira 2.x version.
3. At least one measure should be available in the Query/View.
4. Query/Views with hierarchies enabled cannot be used as Data Source.