Visual BI Instant BI template for SAP Lumira Designer 2.1

1 Copyright

1.1 Trademark Information

1.2 Patent Information

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2 Connecting to Data Sources

2.1 Instructions

1. In the Welcome Screen, select a connection by clicking on the Icon.

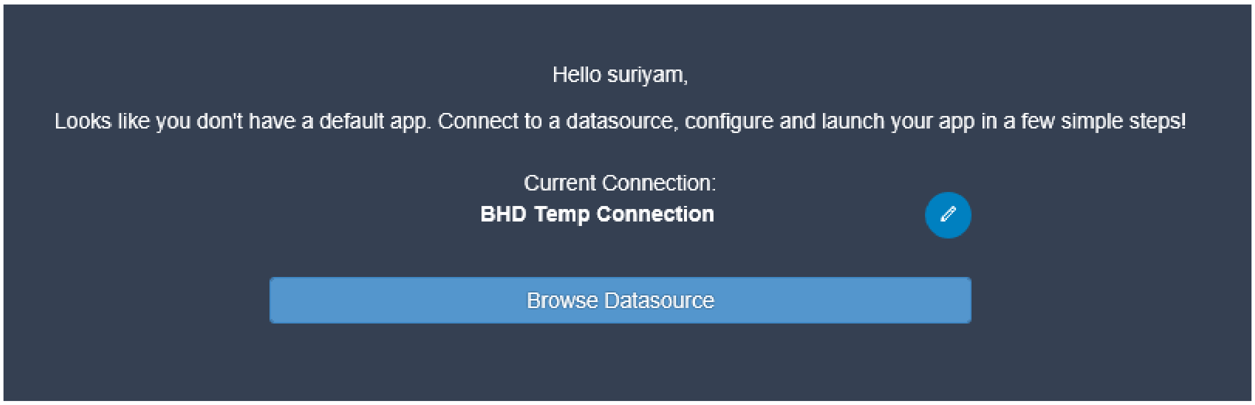

Figure 2.1 – Welcome Screen

2. In the **CONNECTIONS** dialog box that appears, select the desired connection and click **Connect**.

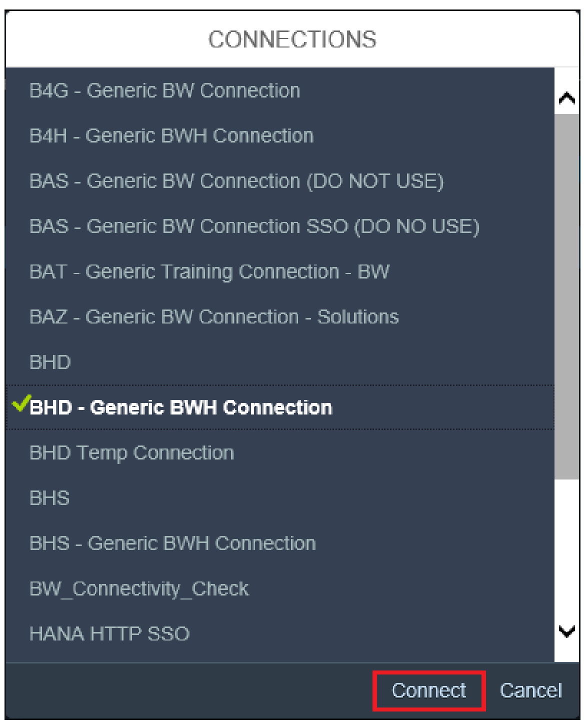

Figure 2.2 – Choose New Connection

3. Now click **Browse Data source.**
4. In the **Select Data Source** window**,** search for a query name and click the **OK** button.

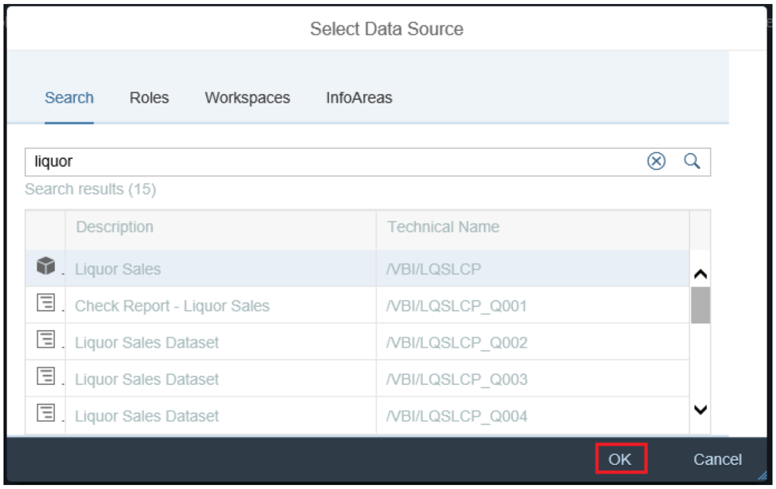

Figure 2.3 – Add Data Source

5. A pop-up window shows the summary of the selected data source. Click **CONTINUE** to proceed.

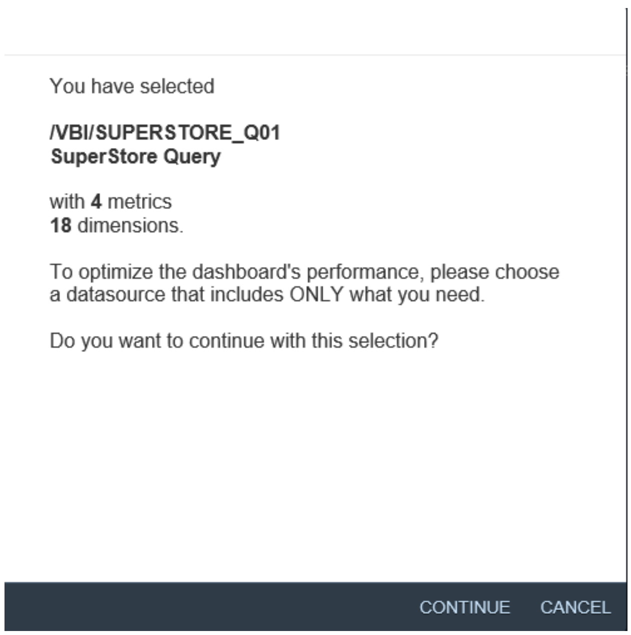

Figure 2.4 – Select Connection

6. The next screen shows up where we can choose the KPIs. The default KPIs that are available in the query are listed under Default KPIs. Custom KPIs can also be created by combining two or more KPIs from the left side. Click **Done** once completed.

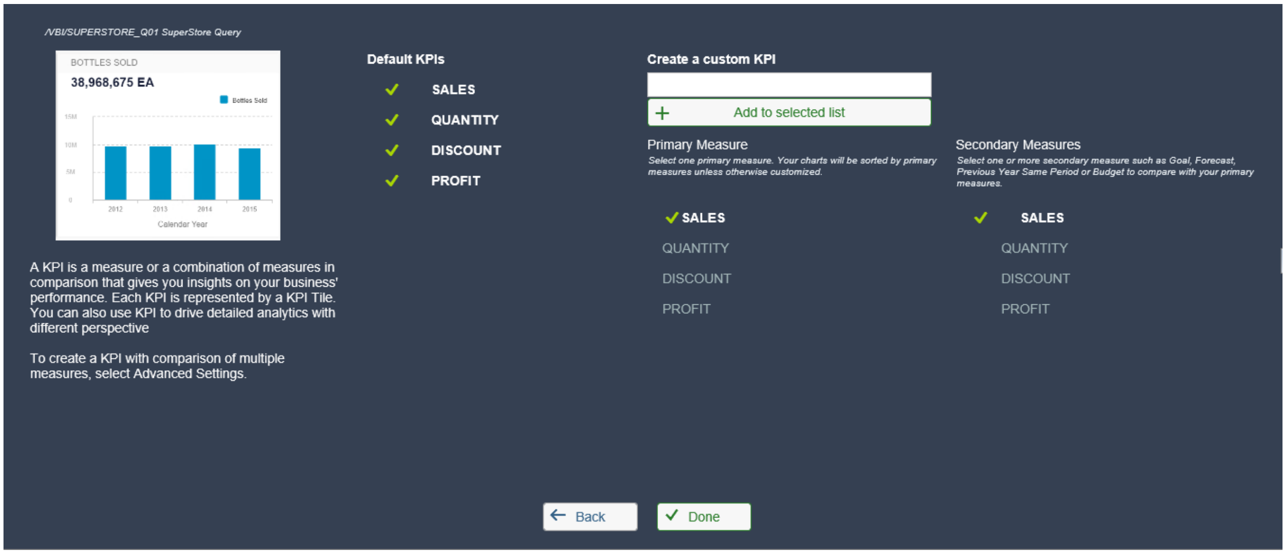

Figure 2.5 – Outline View

> Tip
>
> Only a maximum of 8 KPIs can be displayed. If there are more than 8 KPIs, the first 8 KPIs will displayed by default.

7. In the next screen that appears, choose the dimensions from the list and click **Done**.

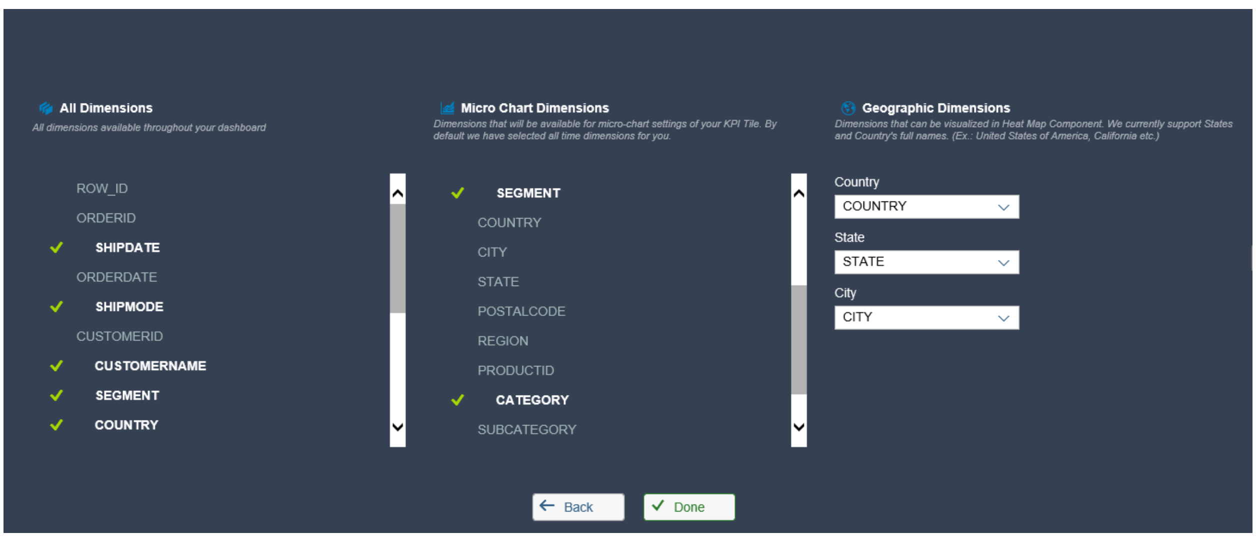

Figure 2.6 – Dimension Selection

8. Enter a name for the dashboard, its description and logo using image URI and click **LAUNCH AND SAVE AS DEFAULT**. This ensures that all configurations made so far will be saved.

3 Working with the Overview

3.1 Instructions

1. The application opens as shown in the figure below.

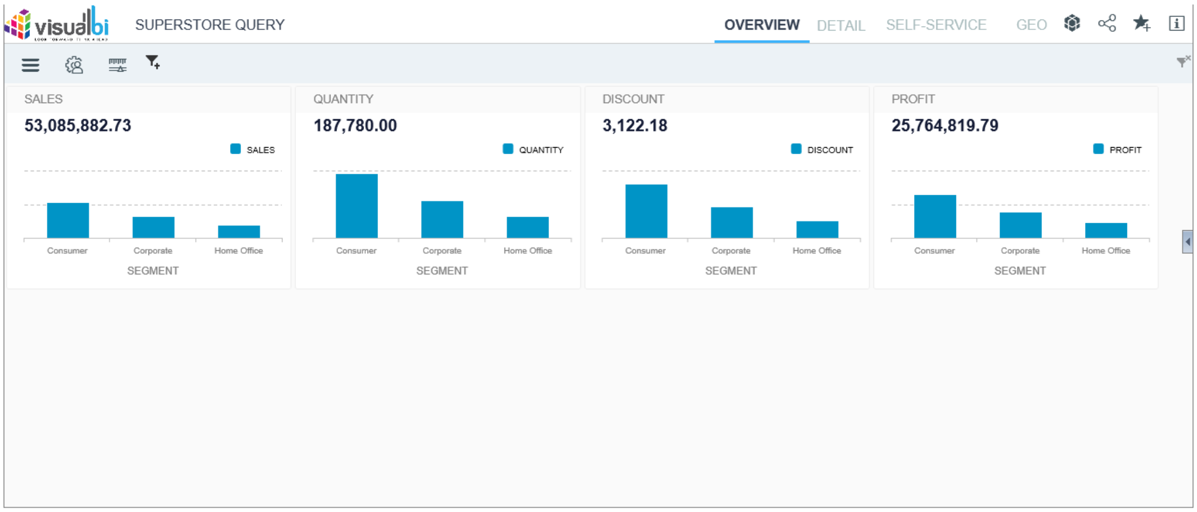

Figure 3.1 – Initial View

2. Click the menu option on the left top to toggle between dimensions you have previously selected for micro chart.

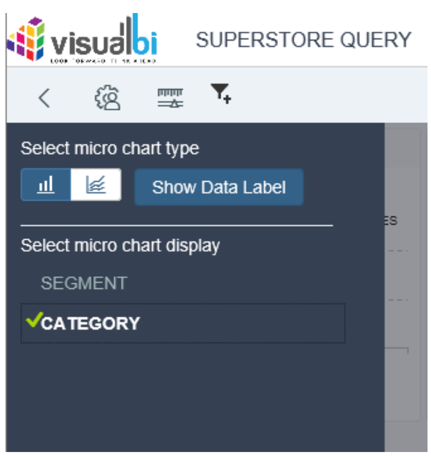

Figure 3.2 – Micro chart Display

3. Click the Custom measure button  to open the **Customer Measure Setting** dialog box. The Scaling factor, Number of decimal places and Unit can be defined in Customer Measure Dialog box.

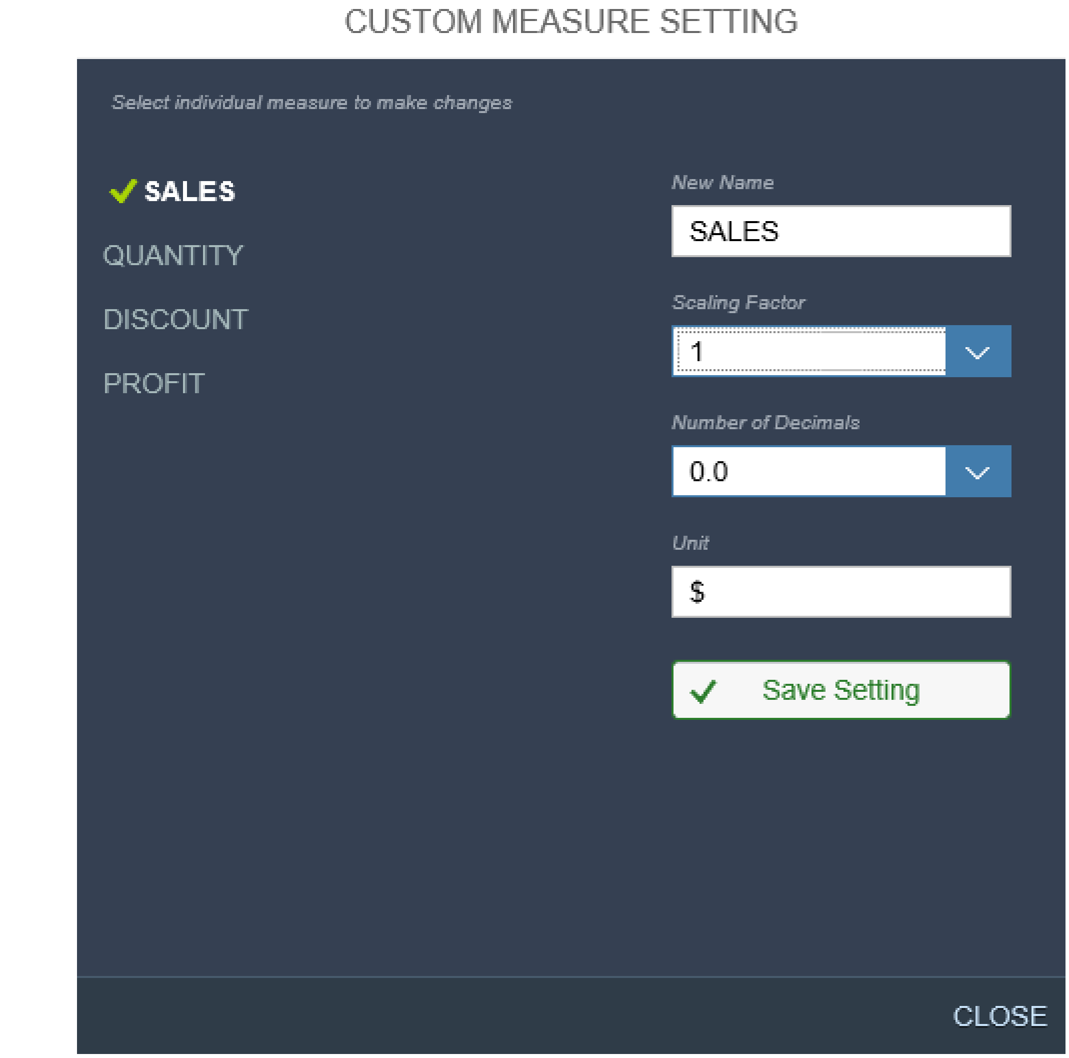

Figure 3.3 – Measure Setting

4. Click on a KPI Tile to perform a detailed analysis.

4 Working with the Detail Tab

4.1 Instructions

1. The Detail Tab can be opened by directly clicking on a KPI tile in the Overview Tab or by selecting the Detail Tab on the top right of the dashboard. In the latter case, you can toggle between KPIs by selecting the menu option in the top left corner.

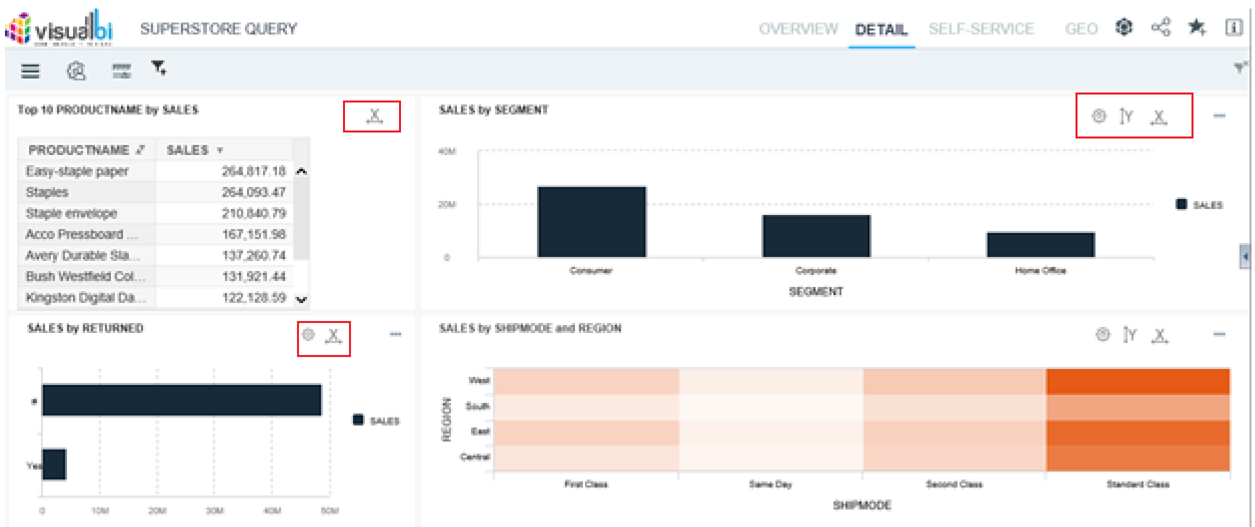

Figure 4.1 – Detailed View

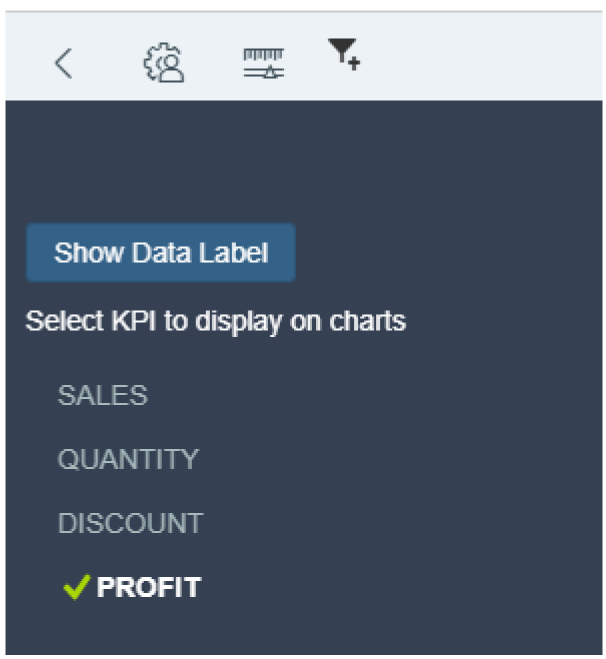

Figure 4.2 – KPI Selection

2. The charts can be modified with respect to Measure selection, Chart type selection, Horizontal & Vertical axis selections through the buttons available above the chart.
3. All the charts in the dashboard act as filters. Click on any chart to set selection as global filter.
4. Action menus are available for every chart to allow users to perform actions like sort, ranking, summation, export and so on.

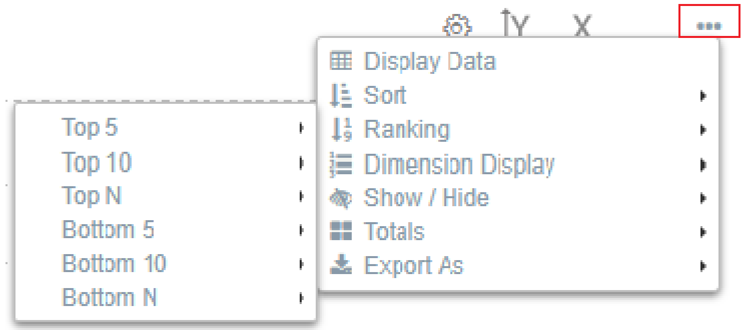

Figure 4.3 Action Menu

5 Working with Self Service

5.1 Instructions

1. The self-service Tab can be opened by clicking on the tab ribbon on the top right. This provides ad-hoc analysis of the dataset.
2. The Ad-hoc Analysis tab has three sub tabs viz. Crosstab, Spreadsheet & Chart and users can choose one to view in desired form.
3. Under Crosstab, Menu options are available for Tables with various options available – Pin Column, Auto size & reset columns.
4. Under Chart, Show Data Label button is available to hide/show data labels for chart. Users can choose any desired chart type from the available types. Menu icon is available at the top right corner of the chart to print or download chart and also to perform zoom, lasso & reverse lassos.
5. The users can toggle between the dimensions either by selecting from the available dimension list or by searching for the dimensions to view data in desired format. Once dimensions have been chosen, click on Go to apply the changes.
6. Right click on the Measures button to explore on more available options like suppressing zeros, add/remove filter, swapping, conditional formatting and so on.

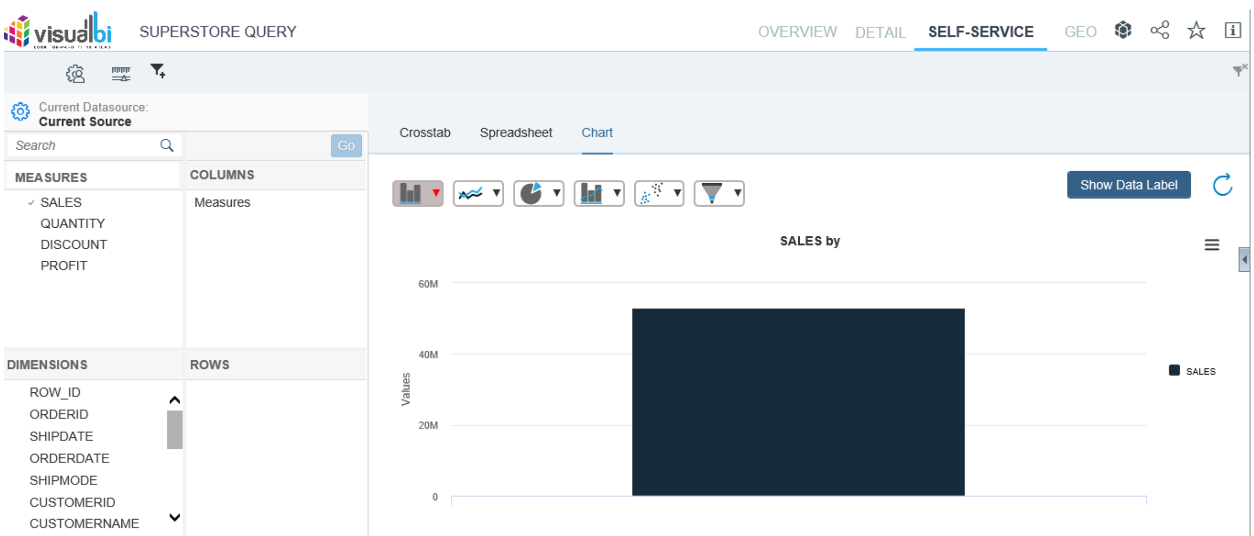

Figure 5.1 – Self Service View

6 Working with Geo Map

6.1 Instructions

1. The Geo tab has two different maps viz. World & USA.
2. If you have a city in your data, the state can be drilled down.
3. The tabular form of data can be seen on the right side of the chart.
4. Zoom in and Zoom out buttons are present at the top left corner of the map to allow users to zoom and see the map.
5. The menu icon at the top right corner of the map allows users to print and download the chart in different formats.

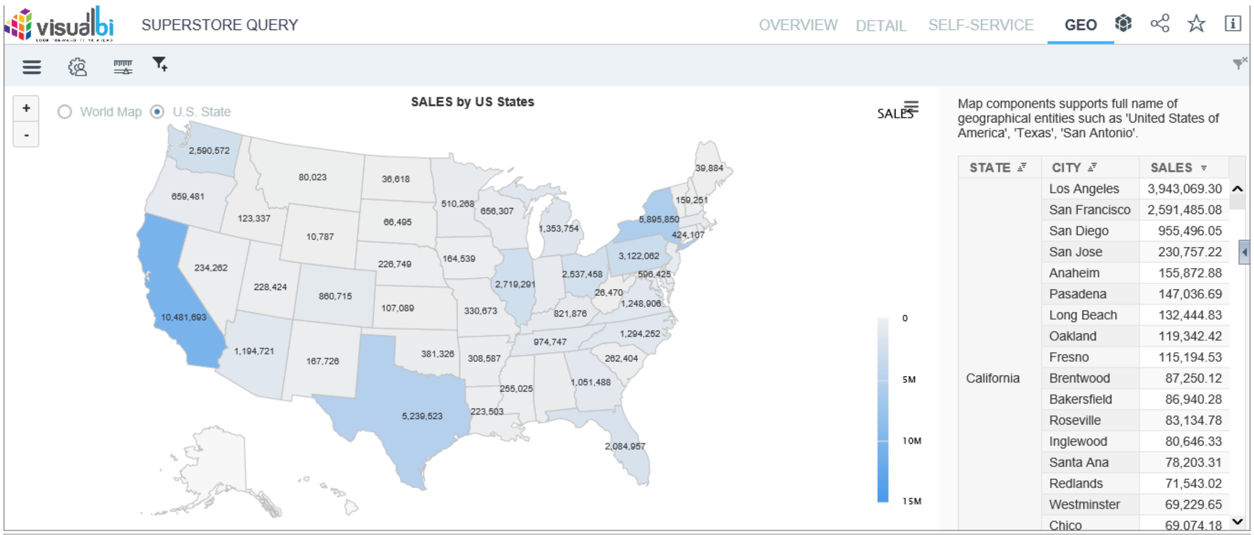

Figure 6.1 – Geo Map View

7 Menu Bar

1. The icons available in the top left corner of the menu bar allows user to change the default view of the map.
2. The Menu icon allows the users to toggle between KPIs to be displayed on the chart.
3. The Settings icon allows users to change prompt values incase variables are present.
4. The Measure settings icon enables the users to change the format of the measure values like scaling factors, decimal places and units.
5. The Add filters icon allows users to add new filter values for any dimensions.
6. The Clear filter icon in the top right corner of the menu bar will clear all the filter that has been set for the dimensions. This icon will be enabled only if any filters has been set.

8 Additional Functionalities

1. Four icons are available on the right side of the Geo tab to allow user to achieve additional functionalities.
2. The Connect Data Source button takes user to Open Data Source window (initial window) where users can choose different system and data source for the dashboard at any time.
3. The Share icon allows users to share URL of the current view of the dashboard via mail.
4. The bookmark icon will save all the changes made to the dashboard since launching as the default view of the dashboard. On saving the current view, the icon changes to which clears the default settings.
5. The App info icon will show the dashboard information to users.

9 Uploading the document

9.1 Instructions

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**.

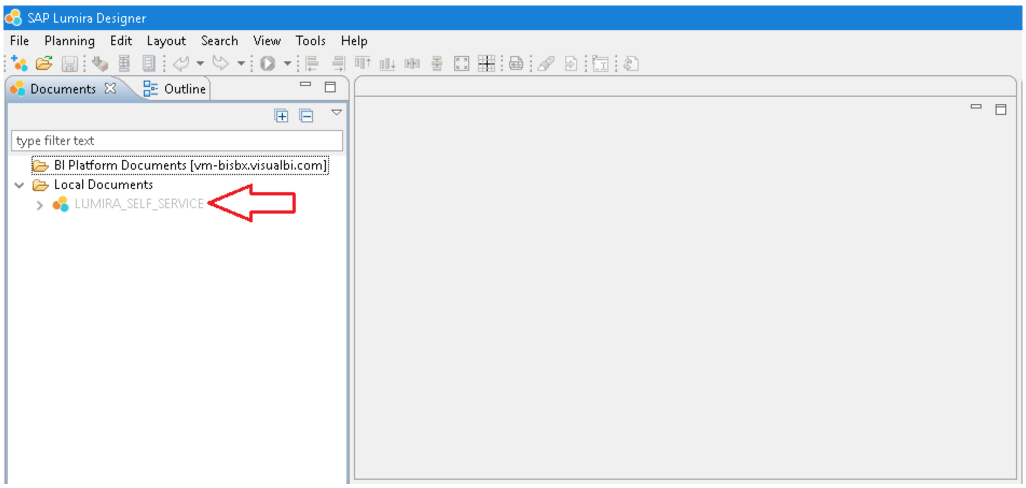

Figure 9.1 – Local Documents

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.

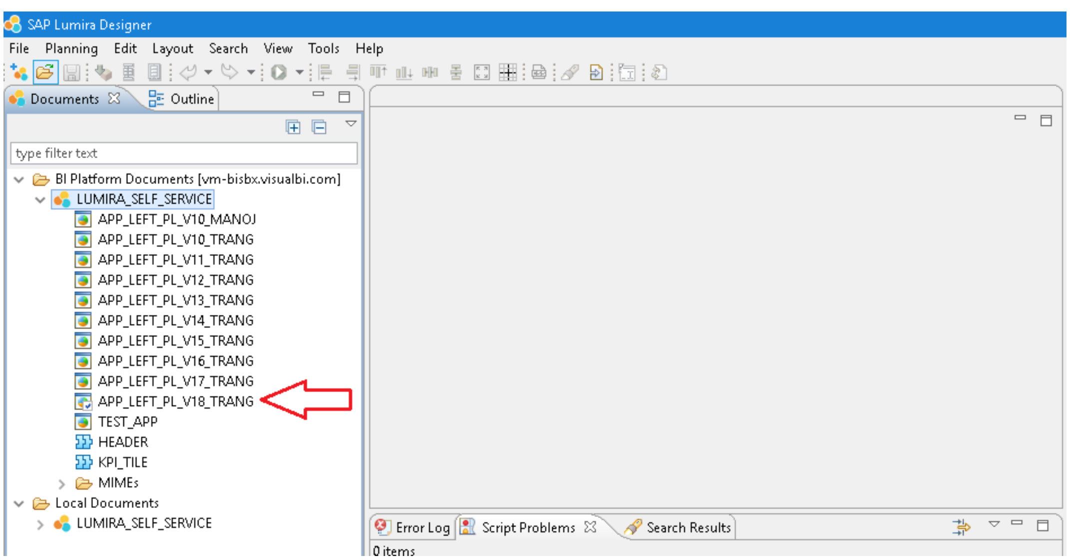

Figure 9.2 – Choose New Connection

Tip

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**.

10 Limitations

1. Queries with large data set cannot be used.
2. The dashboard is supported only in Desktop and iPad. In iPad, only the first page i.e., Overview will be shown.
3. Latitude and Longitude information could not be mapped in Geo maps. Only State and City can be mapped.