

Documentation CBI Focus Planner (Planner)

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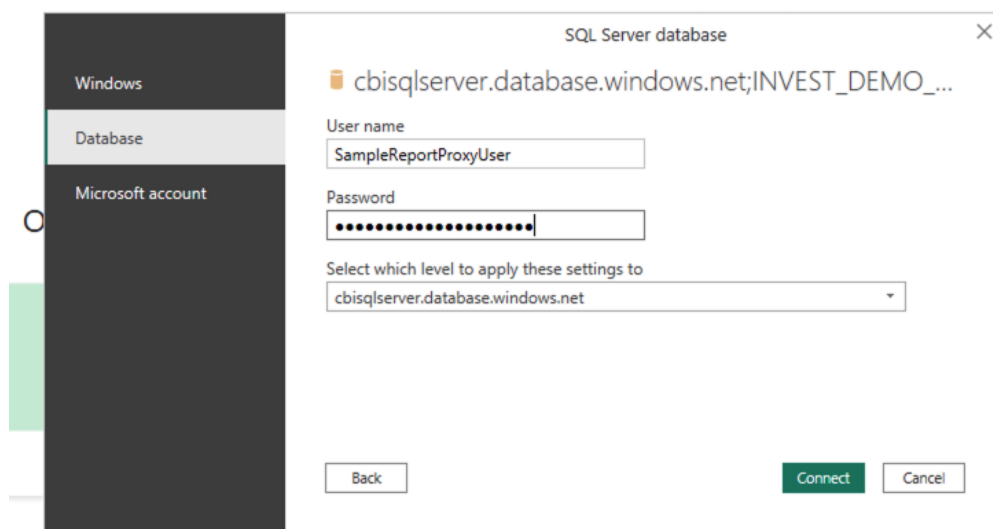
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1. User model

SQL-Server provides tiered access management, which assigns users to specific roles that allow them to access only defined data. This contributes to data security and reinforces the trustworthiness of the database.

The user model describes how users can access and interact with data to run queries for reporting and analysis. In this context, user roles define who can access which data and to what extent it can be manipulated.

For this reason, CBI Focus Planner distinguishes between two types of users. These two users are understood as technical users and are also SQL Users. On the one hand, there is the DB (database) user, who creates the database on the SQL server and manages it. The DB user creates with this database a dataset and uses the CBI Focus Planner to build the Power BI report. For connecting the database with Power BI and creating a report, the report editor must log in with the DB user. Once the editor or planner is logged in with the proxy user, he can manage the rights for the writeback function. Therefore he is also able to use the writeback-function.



On the other hand, there is the proxy user that gets rights from the DB user to writeback data and save them in an appropriate way.

2. Role model in Custom Visual Focus Planner

In the Custom Visual Focus Planner there are many possible ways to distribute access and writeback rights. This part of the documentation will address the limitations of this distribution. As mentioned in chapter 1.2.3 Custom Visual needs two SQL Server users, the Proxy user and the DB user. These users are technical users, who are associated with certain rights. Every user is assigned by the database designer to a specific data role, which enables the user to certain rights. A user could be a Windows user or an SQL Server user, who has different ways to gain access to the writeback-function.

However, in reality we assume that there are different editors who create the report and its dataset and different planners, who mainly interact with the Custom Visual Focus Planner. In that case **editors** and **planners** are categories of data roles. While editors also manage the database

and assign access rights to others, each planner neither has permission nor can he design the report.

These two roles summarize the function and possible distributions of technical users. To get a good example of this, below is an overview of how the users can be assigned to the roles.

3. Operating as Planner CBI FP

3.1. Data acquisition / Cursor Navigation

The handling of the Visual is via the arrow keys, the mouse and the escape key defined. Planners can use the arrow keys to select individual cells and the escape key to exit the visual. Another possibility would be the mouse, which has the same functions. Only writable cells react when the keyboard is used. This way the data is protected against manipulation.

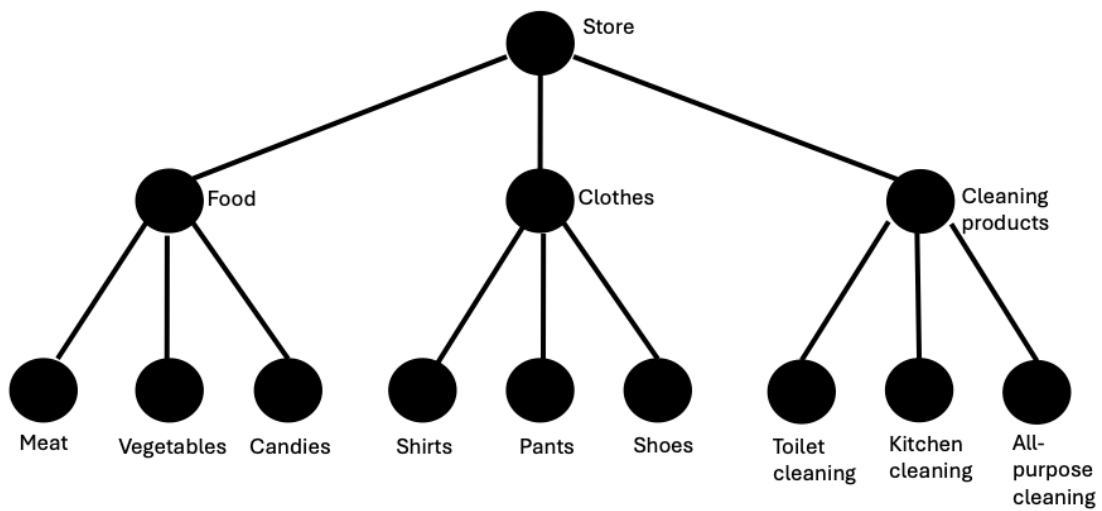
	Proxy user	DB user
Editor	<ul style="list-style-type: none"> • Create report • Manipulate values • Give access for writeback function 	<ul style="list-style-type: none"> • Manage database • Create dataset • Manage access rights • Manipulate values • Create report
Planner	<ul style="list-style-type: none"> • Manipulate Values 	—

3.2 Cashing with CV Focus Planner

When working with the Custom Visual Focus Planner different changes and calculations are first stored in a temporary cache. Only when saving these changes, will the data in the SQL server be changed too.

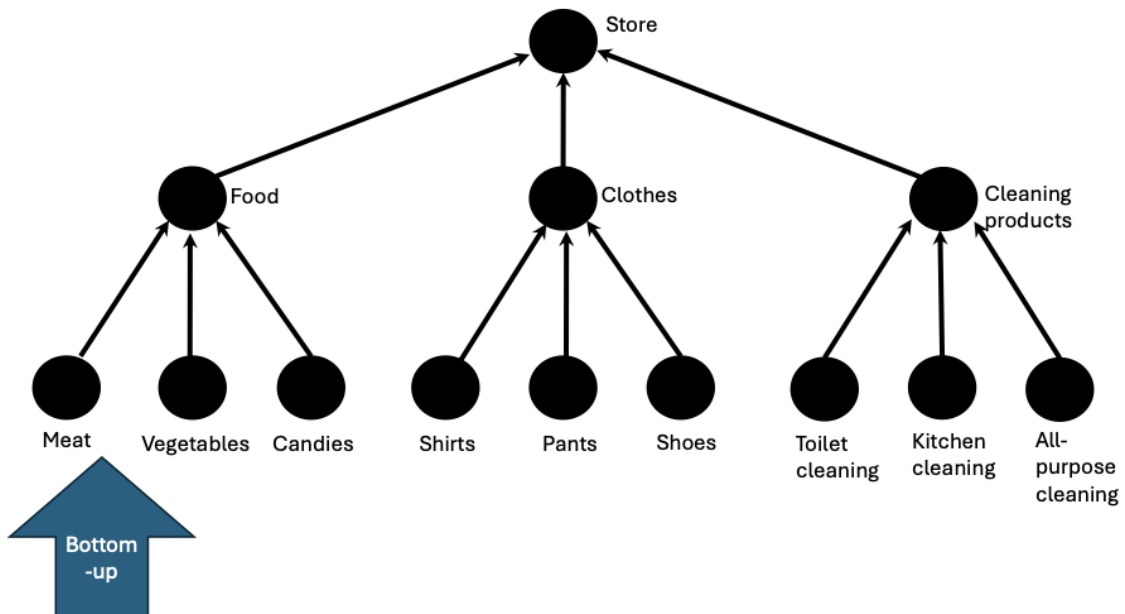
3.3. Special features of data collection with hierarchical dimension

Custom Visual Focus Planner works with hierarchical dimensions that simplifies calculations for planning methods. Row and columns each form a hierarchical level with nodes and leaves and are used in two different ways.



3.3.1 Bottom-up

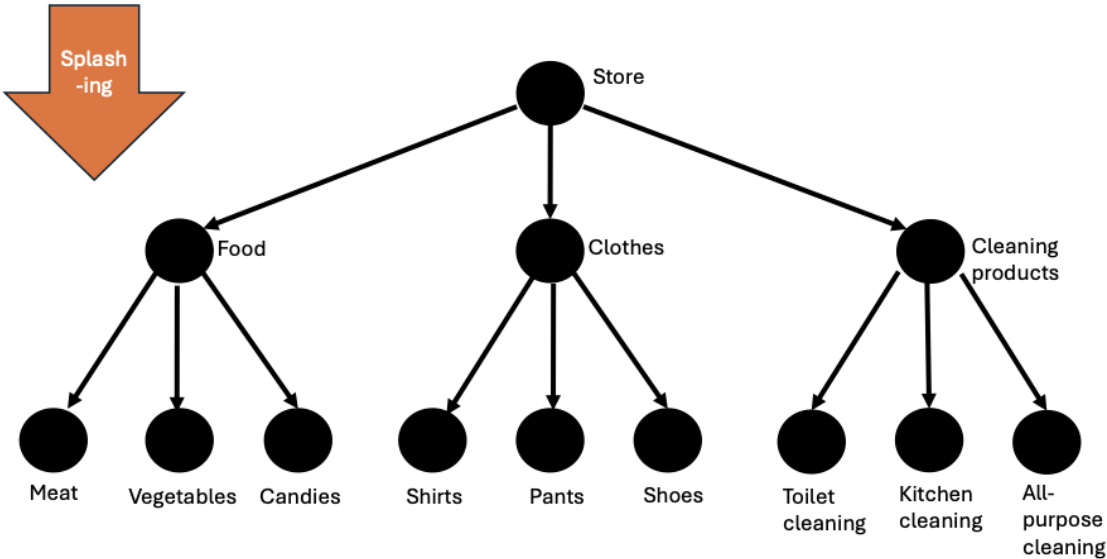
One way is the Bottom-up calculation, which means that leaf nodes are summed up to form the top node. The Custom Visual performs Bottom-up calculations after each change in a leaf, so nodes are updated dynamically.



3.3.2 Top down/Splashing

The other calculation is the Top down calculation or also known as splashing. If Planners change nodes in the spanning tree, the Custom Visual will customize the leaf values below the node.

There are three different splashing methods and if the editor did not define a specific calculation for the column, the planner is able to choose between one of these three methods.



The first is the "Equally weighted distribution", which assigns equal values to chosen leaves, which when summed up make up the node value.

Another splashing method is the "Same value distribution". It assigns the value that was entered in the node cell to chosen leaves.

Finally, there is the "Per quota distribution" that is a distribution corresponding to the value ratio of a particular column.

Choose distribution type

Equally weighted distribution
Distribute value equally across all sub-cells.


Same value distribution
Apply same value to all sub-cells.

Per quota distribution
Distribute value according to distribution ratio of selected column.

CANCEL

After choosing the distribution type, the planner is asked if he wants to overwrite all leave nodes with value or not. When entering “Keep existing values” all cells with values remain unchanged. Nevertheless, empty cells are required to realize the change in values.

How to distribute the total value?

 One or more cells are already filled.

Overwrite existing values

Total value is evenly distributed to all cells, overwriting the current values with new ones.

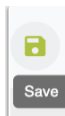
Keep existing values

Total value is evenly distributed to empty cells only, keeping all existing values.

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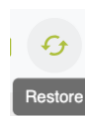
3.4. Operations as Planner

A planner has only the responsibility to work with the Custom Visual. Therefore, he is only able to writeback. Besides the writeback function there are features that simplify the handling with the CV Focus Planner. These features are on the top of the Custom visual.



To save your progress, there is a save button in the left top corner.

Next to the Save button is a Restore button. This will undo all changes made since the last save.



Another feature for dealing with changes is the Undo and Redo buttons. Planners can undo changes or revert to the previous state.

4. Support/ Services/ Manuals

4.1 Testversion

To get to know the Visual better, a trial version is available on Microsoft AppSource. It includes a sample database and report designed with CBI Focus Planner and is available for free download.

Link:

4.2. L Runtime environment (Desktop/ Cloud/ Mobile)

The Custom Visual Focus Planner supports Power Bi desktop clients and Power BI browser clients on Chromium.

Here is a short list of Chromium browsers: **Google Chrome**, **Microsoft Edge**, Brave, Opera, **Vivaldi**, Samsung Internet (Beta), Samsung Internet (Beta). In addition to them Safari is also possible.

An adapted mobile version of the Custom Visual for smartphones is not available.

It is not possible to export the whole data from the Customer Visual report to a PDF.