

User Guide

Dashboards v1.0

VDMbee Value Management Platform extension



Contents

Introduction	3
Dashboard-related Concepts used in VMP	3
Create a Dashboard	7
Change Dashboard name and delete Dashboard	11
Create Presentation	12
Create Table	13
Navigate Value dependencies from Table	18
Create Chart	19
Create other Types of Presentations	23
Show full Dashboard	27
Presentation Annotation	28
Setting Labels	29
Copy Presentation.....	32
“Heatmapping”: Smilies and Corrective Actions	33
Export Values	37
Create Scenario	42
Apply Scenario	50
Monitoring & Control.....	54
Create Scenario by import	54
Compare Actuals versus Plan.....	58
Life Cycle Management of Dashboards	62

Introduction

This document is meant as User Guide for functional users of the VDMbee Value Management Platform, and focuses on its Dashboards extension.

Dashboards play an important role during the “Adopt” stage of an initiative. They are used to demonstrate Value impact of Plans, and their related business models, as prototyped during the “Prototype” stage of an initiative. As such they are an ideal means to support managerial decision making. Different Dashboards may be designed for different stakeholders in the decision process.

For understanding of the functionality of the kernel of the VDMbee Value Management Platform, the reader can refer to the User Guide of the [VDMbee Value Management Platform](#), as can be downloaded from the VDMbee website. For instance, when a form or type of object that has been explained in detail in that User Guide, also serves in the current User Guide. The user is assumed to be familiar with basic behavior of the VDMbee Value Management Platform, as explained in that User Guide, such as how to navigate back by the breadcrumb that is shown at the top of its pages, e.g., as



[My Plans](#) / [Paperboy](#)

Dashboards can also contain already created Business Canvases and Business Ecosystem Maps. In order to understand how to create these, the reader can refer to the User Guide of [Business Canvases](#) and the User Guide of [Business Ecosystem Maps](#) respectively, as can be downloaded from the VDMbee website.

For convenience the VDMbee Management Platform itself is abbreviated as **VMP**. The frequently occurring term “Business Model” will be abbreviated as **BM**.

This User Guide does not contain any technical specifications. It just explains the functionality of the Business Ecosystem Maps extension of VMP, based on its various application forms.

Note: Terminology in this document assumes using a mouse (or touch pad) to generate User Interface events, e.g. “click”, “mouse-over”, “hover”, “drag”, etc. When you use a device that is touch enabled, touch event counterparts can be used to trigger the same behavior.

Note: Throughout VMP, User Interface (UI) controls that require input are marked with an **orange** star (*).

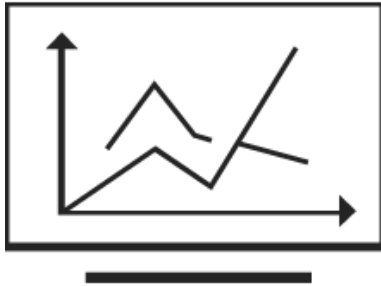
This User Guide starts with introduction of some Dashboard-related concepts, as used in VMP. Subsequent sections will then demonstrate how to create Dashboards, for the purpose of demonstrating impact of the Plan and possible Scenarios, to facilitate decision making in the context of business innovation or transformation.

Examples in this User Guide will be based on the [Paperboy Example](#), as can be downloaded (and imported into VMP) from the VDMbee website.

Dashboard-related Concepts used in VMP

As every Concept in VMP, also Dashboard-related Concepts are associated with an icon, which is used to denote that Concept in VMP, as well as in related materials such as this User Guide, training material, etc.

Dashboard



A **Dashboard** can be designed to present prototyping results, i.e., Value impact, to business users, to facilitate decision making.

The scope, as well as the presentation layout of a Dashboard can be designed to the needs of the business user.

Value

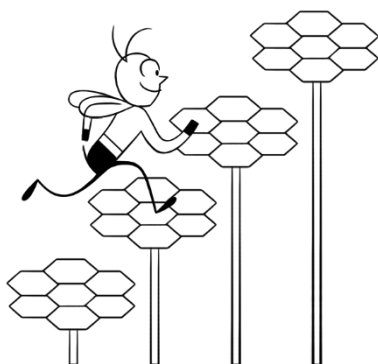


Better businesses innovate and transform continuously to create and secure Value.

Values are the matters of interest or importance to the stakeholders of the Business.

In the context of this User Guide Values are delivered with Value Propositions (see below), or are captured with My Propositions (see below).

Plan

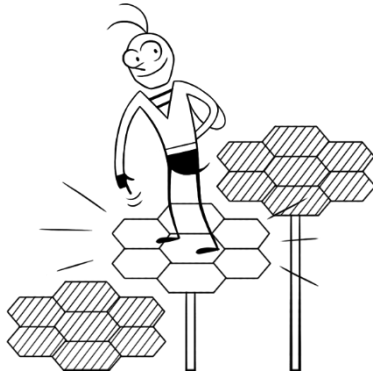


Management of an innovation or transformation initiative requires a **Plan** as the vehicle to define and execute strategies.

A Plan is a phased proceeding to achieve a strategic or tactical goal.

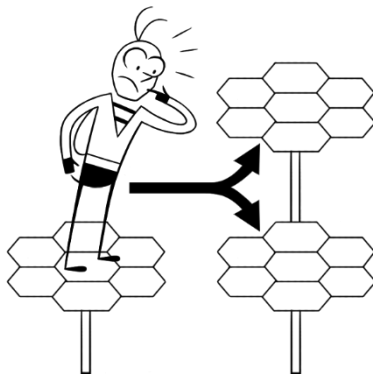
Plan Values, though not explicitly considered in this User Guide, are defined as basis for management and measurement of success of plan outcomes. Plan Values are the basis of defining Plan objectives.

Phase



A Plan consists of **Phases**. Phases are the steps that are defined towards achieving the goal. Phases are time-bound. Value objectives, though not explicitly considered in this User Guide, can be defined and managed per Phase.

Alternative



Per Phase, one or more **Alternatives** can be defined. Alternatives are possible approaches that are explored with respect to their achievement of Value objectives of a Phase.

Scenario

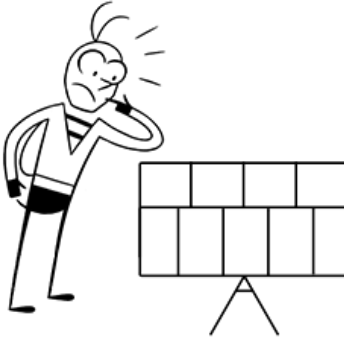


Dashboards also come with light-weight what-if Scenario analysis and simulation support, whereby different Measurement sets, for a selective subset of Input Values can be used to simulate impact. This includes impact on future Phases of the Plan.

A business user can consecutively decide upon which Scenario is best, and apply that one as basis for continuation. Other Scenarios may, thereafter, be removed, if needed.

A Scenario can be used to change Measurements across the Plan, possibly in all Phases and Alternatives, whereby in each Phase and Alternative, the structure of the Business Models is kept unchanged. So, on one hand, the scope of a Scenario is broader (i.e. Plan-wide) than the scope of an Alternative. But on the other hand, less can be varied by a Scenario, than can be varied by an Alternative, namely Measurements only.

Business Canvas

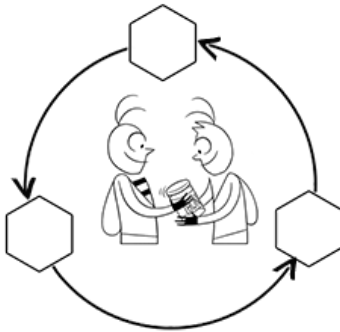


A **Business Canvas** can be used to capture ideas, or other information, early on in a business innovation or transformation initiative. This is typically done during brainstorm sessions or workshops.

A famous example is the so-called Business Model Canvas. This type of Business Canvas, and also variations of it, such as the Lean Startup Canvas, captures ideas about a new or transformed BM. Information that is captured in such Business Canvases can be mapped to model data in the more structured representation of BMs, as is used in VMP for prototyping strategy and impact analysis of business innovations or transformations.

Other types of Business Canvases may further support discovery or analysis early on in an initiative, even when the information that is captured in it cannot be mapped to structured BMs directly. An example of this latter sort of Business Canvases is the SWOT Analysis Canvas.

Business Ecosystem Map



A **Business Ecosystem Map** can be designed to graphically specify how Participants in Business Model(s) collaborate by exchanging Value Propositions with each other. This map is typically used to provide a big picture of the Business Ecosystem in which Business Models live. It will also help to oversee and understand relationships in the often complex situations.

A Business Ecosystem Map can include various levels of detail, whereby nodes in the graph may represent Participants, their Roles or their Business Models, even in hybrid combinations. Connectors represent how Value Propositions are provided and received.

Elements in the Business Ecosystem Map can be mapped to elements in structured Business Models and their related Participant Networks and Value Propositions in the Value Management Platform. Based on such mapping, elements in structured Business Models can be created and existing ones can be selected for visualization.

Package



Model data, underlying and supporting Plans, is enabled for modular use and life cycle management (evolution over time).

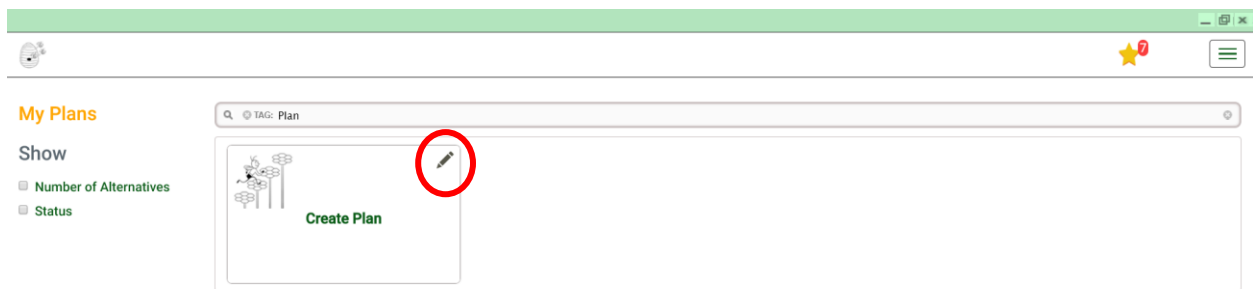
For this purpose **Packages** are introduced.

A Package contains Model data and serves as scope for re-use and evolution of the Model data over time, i.e. from Alternative to Alternative and from Phase to Phase.

Dashboards are contained in Packages as well. A Package may contain multiple Dashboards. Different Dashboards may be contained in different Packages. By default they are contained in the same Package.

Create a Dashboard

For the sake of demonstrating dashboards, we use the [Paperboy Example](#), and import its related dataset. For this purpose, in the “**My Plans**” page, click the pencil to create a new Plan, as follows:



This starts “**Create Plan**”.

The dataset could be imported via button “Import”, namely when its “.vpk” file is available locally, but for convenience we import it from the VDMbee Cloud directly, via pressing button “Cloud”. This starts the “**Cloud**” form.

Cloud ×

Item	Type			
Industry 4.0 model for Sensor&Co	Examples			
Low Cost Carrier (Exercise 7.2)	Examples			
Paperboy	Examples			
Mission	Examples			

Close

The Paperboy dataset is then imported by pressing the download button. The result of this is shown in the **“My Plans”** page, which is now populated with the Paperboy Plan.

My Plans

Show

☐ Number of Alternatives
 ☐ Status

Paperboy

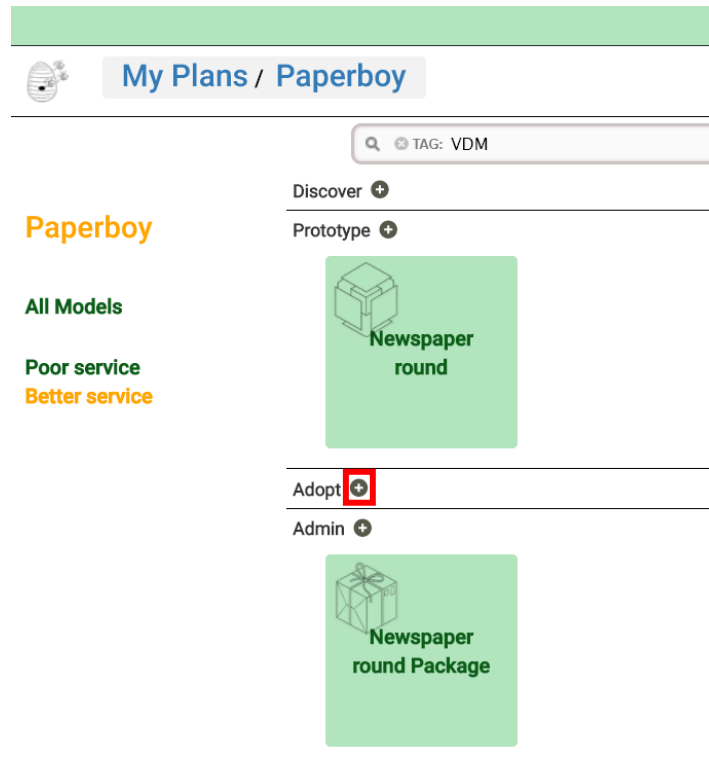
Create Plan

Poor service (As-is)

Better service

Create Phase

Though a Dashboard can be created in any Phase (and Alternative) of the Plan, for convenience we create it in the second Phase (**“Better service”**). This is to best enable the demonstration, later on, of life cycle management aspects of Dashboards, when e.g. a new Phase is created. Clicking Phase box of **“Better service”**, starts the **“Plan page”** in the context of that Phase. A fragment of that page is shown below. Note that Phase **“Better Service”**, as shown on the left side of the page, is highlighted in **orange**, which indicates that the page is viewed in the context of that Phase.



Adoption is about presentation of Plans, as result of Prototyping, in order to support decision making and initiation of change in the Business(es) concerned. Dashboards are important for that purpose.

Hence, we click the (+) button in the “Adopt” region of the “**Plan page**”. This starts “**Create Model**”, in a mode that only allows for creation of “Adopt” Models, which are Dashboards and Reports. To create a Dashboard, the form is filled as indicated below.

Create Model

Name*

Newspaper round transformation impact

Description

Newspaper round transformation impact

Select Type

Dashboard

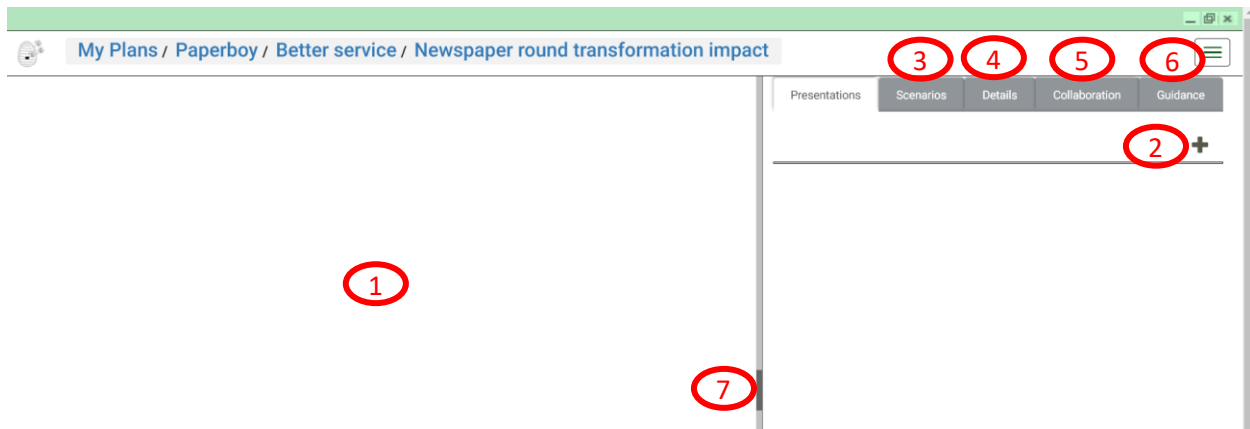
Select Package

New

Close

Complete

Pressing “Complete” starts the “**Dashboard editor**” on the “Newspaper round transformation impact” Dashboard, as follows:



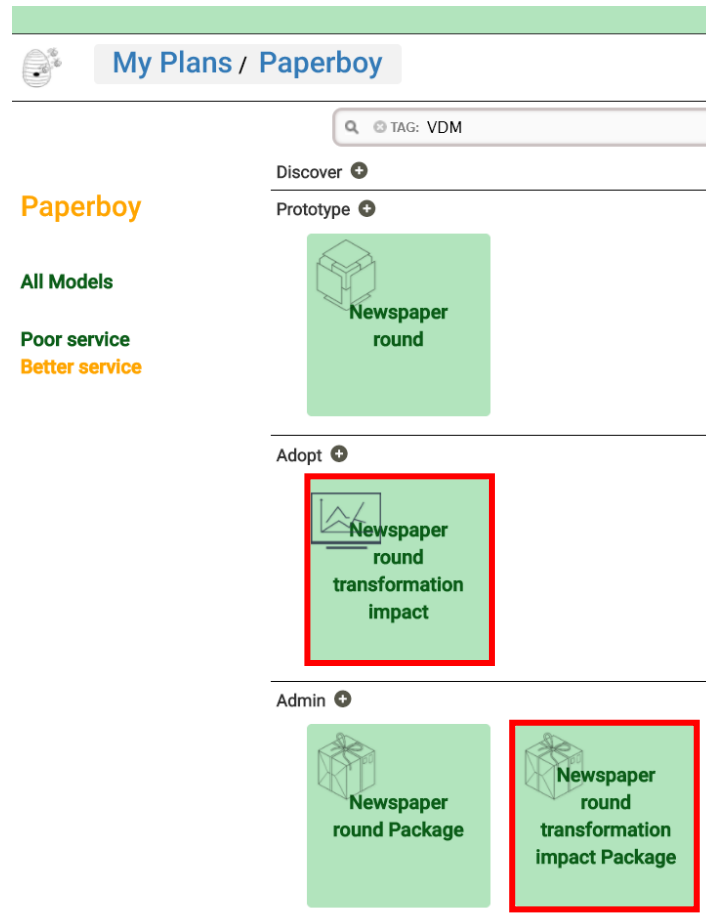
Explanation of form controls

Control 1	The actual Dashboard area, where Presentations, once created via Control 2 , will appear
Control 2	Button to create a Presentation. See Create Presentation
Control 3	Tab in which Scenarios can be created. See Create Scenario
Control 4	Tab in which Dashboard details can be edited. This includes changing the name of the Dashboard and deleting the Dashboard. See Change Dashboard name and delete Dashboard . This tab also supports setting (i.e., selecting) Input Values for Scenarios. See Create Scenario . Importing and exporting Dashboard data (Measurement values) is supported via this tab as well. See Export Values and see Create Scenario by import
Control 5	Tab with support for team work (Collaboration); this functionality is not yet available
Control 6	Tab with Guidance, explaining the purpose of Dashboards and providing some guidelines for using the “ Dashboard editor ”.
Control 7	Vertical splitter, dividing the page between the actual Dashboard area (Control 1) and the right-hand side tabs area. The right-hand side tabs area can be closed (and expanded when closed) by clicking the dark region on it, or by just dragging the splitter.

The breadcrumb can be clicked to navigate back to the “**Plan page**”, as follows:

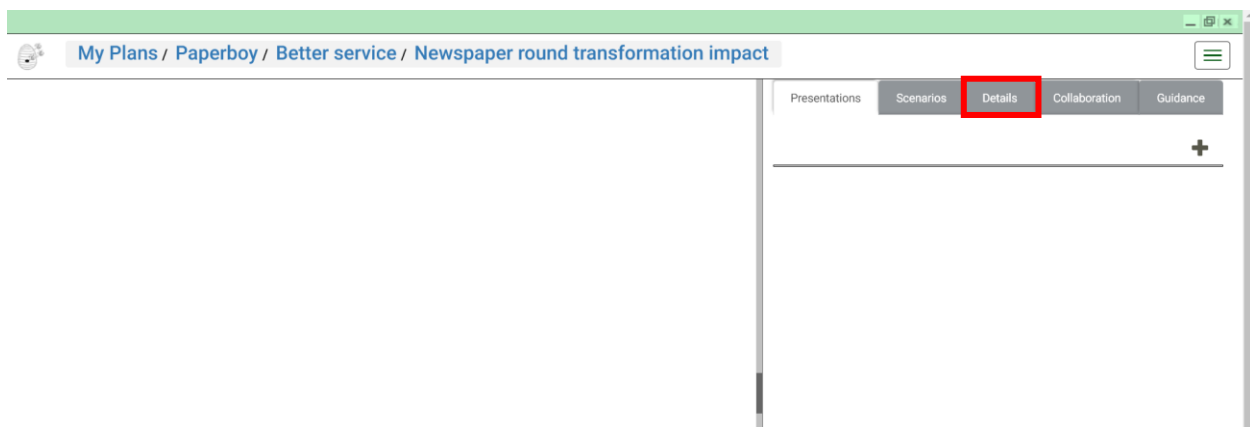


The “**Plan page**” shows the newly created Dashboard (in the “Adopt” region), as well as the Package that contains it (in the “Admin” region), as represented by their **green** Model boxes.



Change Dashboard name and delete Dashboard

Clicking the **green** Dashboard box in the “**Plan page**” (see the picture above) Starts the “**Dashboard editor**” on it.



The “**Details**” tab can be used to change the name of the Dashboard, by editing its Name, following by pressing button “Complete”, to save the change.

Presentations Scenarios Details Collaboration Guidance

Name

Description

Show entries Search: Add Another

Input Values	Source	Source Type	Delete
No data available in table			

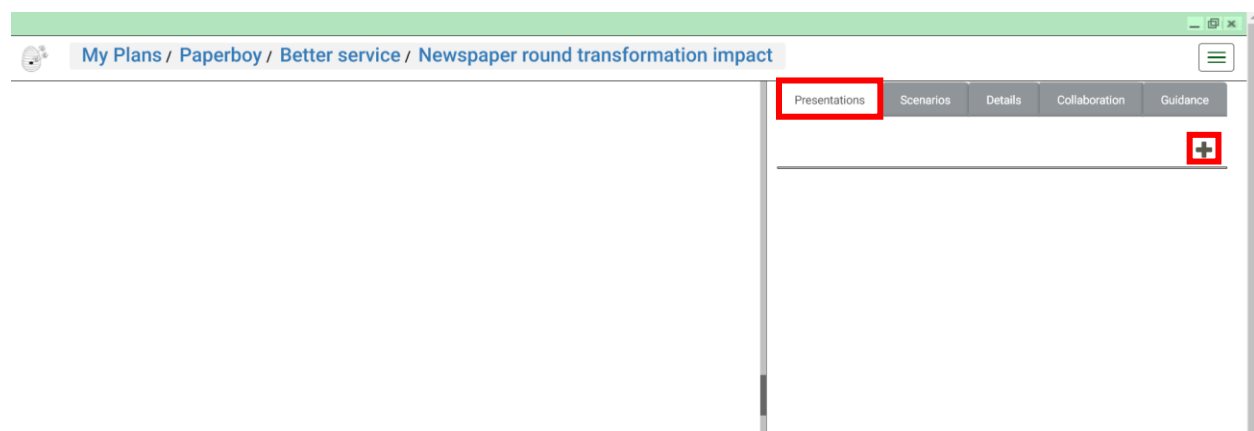
Showing 0 to 0 of 0 entries Previous Next

On the same tab, the “Delete” button can be used to delete the Dashboard. When a Dashboard is deleted in the same Phase (and Alternative) in which it was created, Scenarios that have been created in association with the Dashboard (see **Create Scenario**) are deleted as well. In **Life Cycle Management of Dashboards** some more possible consequences of Deleting a Dashboard will be discussed.

Create Presentation

A Dashboards can be populated with multiple multiple pieces of information, arranged on a single screen so that it can be viewed and monitored at a glance. In VMP, such pieces or “widgets” are called “Presentations”.

Presentations can be created via the “**Presentations**” tab.



From the “**Presentations**” tab of the “**Dashboard editor**” page, a new Presentation can be created by clicking the “+” icon. Clicking it starts the “**Create Presentation**” page.

The screenshot shows the 'Create Presentation' form with the following elements:

- Control 1:** Name* input field containing 'Transformation impact'.
- Control 2:** Description input field containing 'Transformation impact'.
- Control 3:** Type dropdown menu with 'Business Canvas' selected. The dropdown list is open, showing options: Business Canvas, Business Ecosystem Map, Chart/Table (highlighted in blue), Notes, and Select Business Canvas ...
- Control 4:** Delete button (trash icon) at the bottom left.
- Control 5:** Close button at the bottom right.
- Control 6:** Complete button at the bottom right.

Explanation of form controls

Control 1	Input field to edit the name of the Presentation
Control 2	Input field to edit the description of the Presentation
Control 3	<p>Drop-down list to select the type of the Presentation to be created. The following types are supported:</p> <ul style="list-style-type: none"> • Business Canvas. Used to display, and possibly edit, a Business Canvas, as part of the Dashboard. See Create other Types of Presentations • Business Ecosystem Map. Used to display, and possibly edit, a Business Ecosystem Map, as part of the Dashboard. See Create other Types of Presentations • Chart/Table. Used to display Value metrics, i.e., Value impact of what has been prototyped in the Plan. See Create Table, for how to create a Table, and see Create Chart, for how to create a Chart • Notes. Used to complement the Dashboard with additional content, such as explanatory text, or external images or links. See Create other Types of Presentations <p>Default type is "Business Canvas".</p>
Control 4	Button to delete the Presentation
Control 5	Leaving the form without creating the Presentation
Control 6	Leaving the form whereby the Presentation gets created

Create Table



In order to create a Table, select Presentation Type "Chart/Table". This brings the "Create Presentation" Form in the following state:


Create Presentation

Name* Transformation impact

Description Transformation impact


Type Chart/Table


Values	Base Scenario	Select Phase(s)/Alternative(s) 	Select Scenario(s) 


 Delete Close Complete

Clicking the (+) button of “Select Phase(s)/Alternative(s)” starts **“Select Phase(s)/Alternative(s)”**.

Select Phase(s)/Alternative(s)

 Phase / Alternative

 Better service / Base Alternative

 Poor service / Base Alternative


Close Complete


Explanation of form controls


Control 1	Checkbox to select all Phase / Alternatives
Control 2	Checkbox to select a particular Phase / Alternative
Control 3	Leaving the form without keeping the selection
Control 4	Leaving the form whereby the selection is kept

For the sake of the demonstration in this User Guide, “all” Phases / Alternatives are selected, as shown in the next picture.

Select Phase(s)/Alternative(s)

 Phase / Alternative

 Better service / Base Alternative

 Poor service / Base Alternative

Close Complete

Pressing “Complete” (**Control 4**), brings the “Create Presentation” Form in the following state:

Create Presentation

Name*

Transformation impact

Description

Transformation impact

Type

Chart/Table

	Poor service	Better service	Select Phase(s)/Alternative(s) +	Select Scenario(s) +
Values	Base Alternative / Base Scenario	Base Alternative / Base Scenario		
Select Value(s) +				

Delete

Close

Complete

The (+) button of “Select Phase(s)/Alternative(s)” can also be used to adjust the selection of Phases / Alternatives.

After Phases / Alternatives have been selected, the form is enabled to select Values. Clicking the (+) button of “Select Value(s)” starts “Select Phase(s)/Alternative(s)”.

Select Value(s)

1

2

3

Value

Availability [Backup]

Availability [Schedule round]

Backup cost

Bundle size

Compensation

Coordination effort

Execution effort

Extra bike cost

Fee

Fee revenue

Frequency

Hourly income

4

5

Close

Complete

Explanation of form controls

Control 1	Filter bar, to filter the selection of Values.
-----------	--

Control 2	Checkbox to select all Values
Control 3	Checkbox to select a particular Value
Control 4	Leaving the form without keeping the selection
Control 5	Leaving the form whereby the selection is kept

For the sake of the demonstration in this User Guide, we filter on Plan Values, and select “all” Values within that filter, as shown in the next picture.

Pressing “Complete”, brings the “**Create Presentation**” Form in the following state:

Values	Poor service	Better service	Select Phase(s)/Alternative(s)	Select Scenario(s)
	Base Alternative / Base Scenario	Base Alternative / Base Scenario		
Hourly income	0.65 (€ / hour)	5.06 (€ / hour)		
Profit	1425.00 (€ / year)	1053.75 (€ / year)		
Revenue at risk	1417.50 (€ / year)	0.00 (€ / year)		
Select Value(s)				

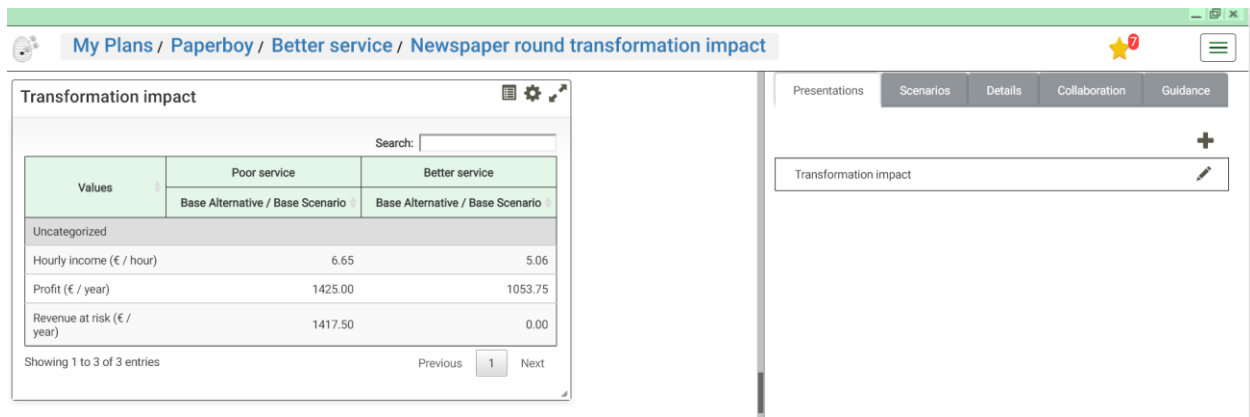
Explanation of form controls

Control 1	Button to retrieve information about the source of a Value in the Plan or underlying Model as prototyped
------------------	--

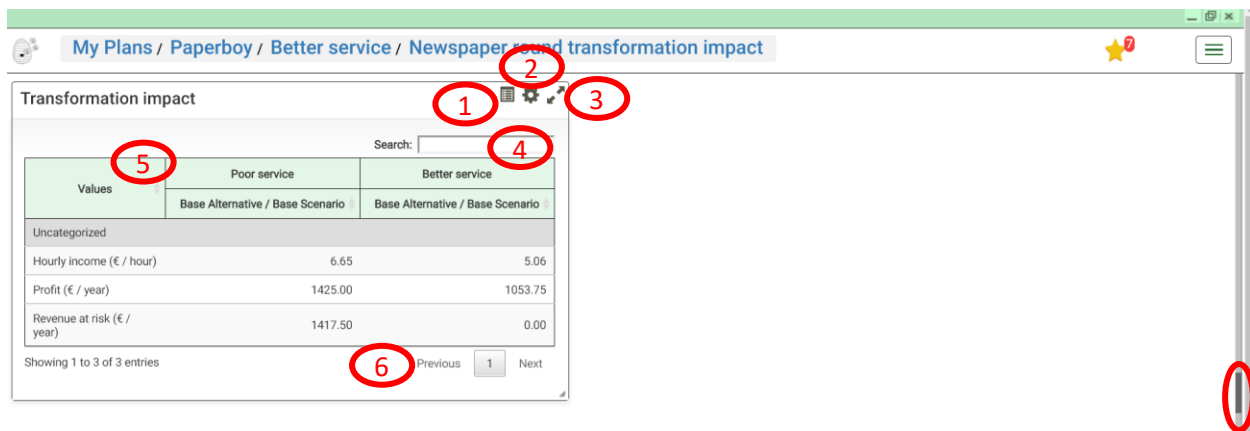
Control 2	Pencil to edit properties of a Value as selected in the Presentation. In particular Label(s) can be set for the Value in the Presentation. See Setting Labels .
Control 3	Pencil to edit properties of a Phase / Alternative as selected in the Presentation. In particular a Label can be set for the Phase / Alternative in the Presentation. See Setting Labels
Control 4	Button to select Scenario(s) to include in the Presentation. See Create Scenario

The (+) button of “Select Value(s)” can also be used to adjust the selection of Values.

Pressing “Complete” triggers the actual creation of the Presentation in the Dashboard. The result of this is shown in the next picture.



Note that the right hand-side tabs area of the “**Dashboard editor**” page shows expanded. When navigating out of the Dashboard and into it again, the tabs area shows as collapsed.



By dragging the vertical splitter, or clicking the dark region on it, the right hand-side tabs area of the “**Dashboard editor**” page is expanded again.

Explanation of form controls

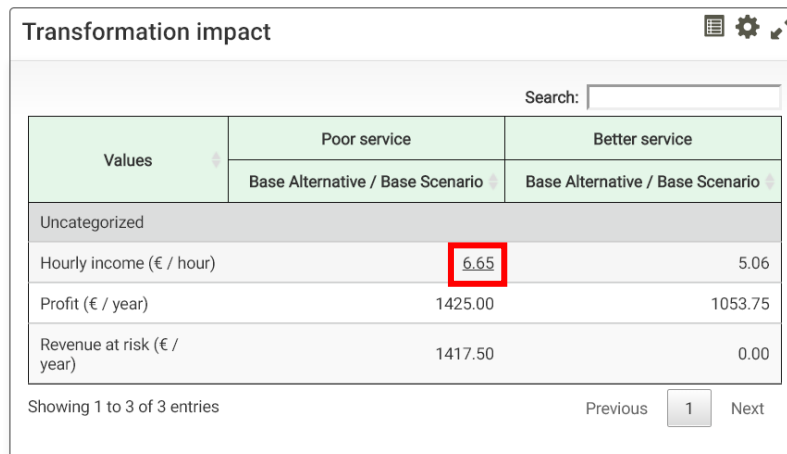
Control 1	Button to create or view Annotation of the Presentation
Control 2	Button (“wheel”) to edit settings for the Presentation. It can be used to change Presentation Type (see Create Chart). It can also be used to export Value metrics (see Export Values)

Control 3	Button to resize the Presentation (to / from full page)
Control 4	Control to search Values in the Presentation. This is useful in case many Values are included. It works as a filter, based on text-based matching (“typeahead search”).
Control 5	Control to order the content of the Table based on the corresponding column. Default ordering is ascending. As long as a column header is not clicked, the control shows as combined soft arrow up and arrow down. When clicking it once, it shows as clear arrow up (indicating ascending order). When clicking it another time, it shows as clear arrow down (indicating descending order). When clicking another column header, it shows as soft combined arrow again.
Control 6	Paging control, to step through sets of rows (Values) in the Table

It is also possible to resize the frame of the Presentation, as well as to resize Table columns. The latter by dragging column boundaries.

Navigate Value dependencies from Table

Measurement values in the Table are active. On mouse-over they show underlined.

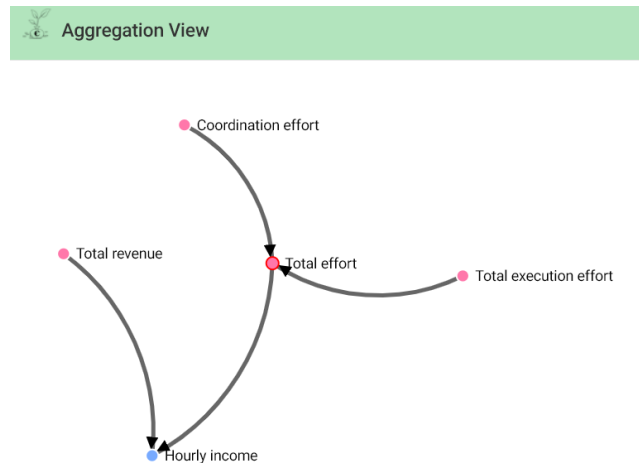


The screenshot shows a dashboard titled "Transformation impact" with a search bar and a table. The table has columns for "Values", "Poor service", and "Better service". The "Values" column has a sub-header "Base Alternative / Base Scenario". The table contains three rows of data: "Hourly income (€ / hour)", "Profit (€ / year)", and "Revenue at risk (€ / year)". The value "6.65" in the "Hourly income" row is underlined and highlighted with a red box. The table also includes a footer with "Showing 1 to 3 of 3 entries" and a pagination control with "Previous", "1", and "Next" buttons.

Values	Poor service	Better service
	Base Alternative / Base Scenario	Base Alternative / Base Scenario
Uncategorized		
Hourly income (€ / hour)	<u>6.65</u>	5.06
Profit (€ / year)	1425.00	1053.75
Revenue at risk (€ / year)	1417.50	0.00

Showing 1 to 3 of 3 entries Previous 1 Next

Clicking the underlined Measurement value will start the “**Aggregation View**”. The next picture shows it, whereby the node of Value “Total effort” has been double-clicked, in order to expand it further. It allows to navigate the Value aggregations in the underlying Model. Value details can be obtained by mouse-over (mouse-tip) as well as by scrolling down in the “**Aggregation View**” to “Node Details” (not shown in the picture below).



The “**Aggregation View**” can be started from many places in VMP. Basically from everywhere where Measurement values are exposed.

Create Chart

Next to Tables, also Charts are supported to display Value metrics. The following types of charts are supported:

- Curves
- Bars
- Radar

All three will be demonstrated here subsequently.

It is possible to create additional Presentations, in the same Dashboard, each using a different Chart Type. It is also possible to just change the existing Presentation. For convenience the latter is done here. For this purpose, click the “wheel” in the existing Presentation.

Transformation impact

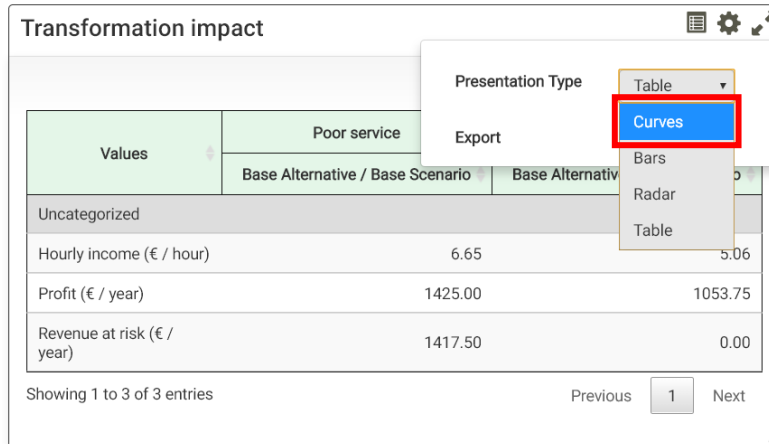
Search:

Values	Poor service	Better service
	Base Alternative / Base Scenario	Base Alternative / Base Scenario
Uncategorized		
Hourly income (€ / hour)	6.65	5.06
Profit (€ / year)	1425.00	1053.75
Revenue at risk (€ / year)	1417.50	0.00

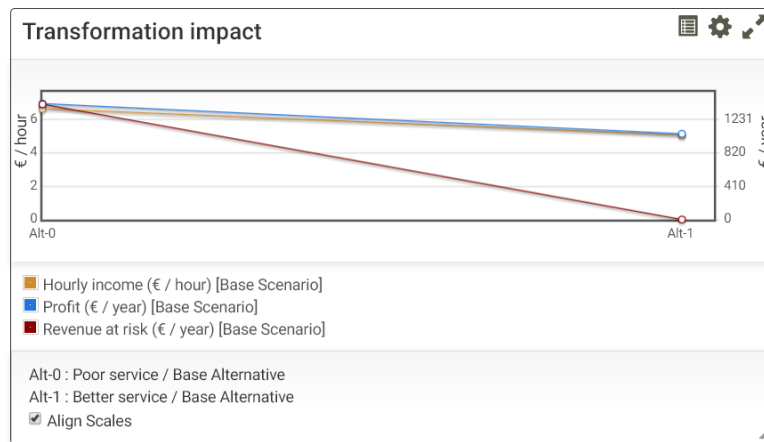
Showing 1 to 3 of 3 entries

Previous 1 Next

This starts a popup, in which “Curves” is selected as “Presentation Type”, as indicated below.

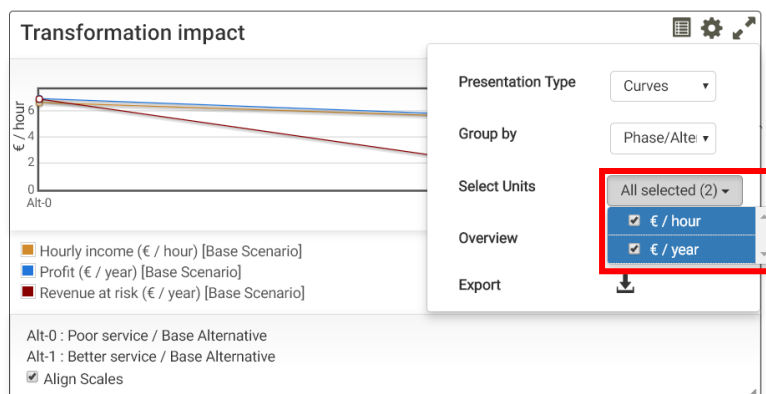


The resulting Curves Chart is represented below.



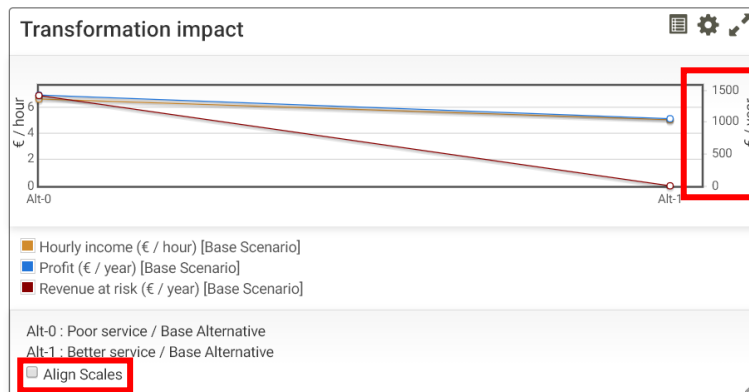
Exact Measurement values can be obtained by mouse-over of a node.

It is possible to deselect and reselect Units, and thereby their scales.



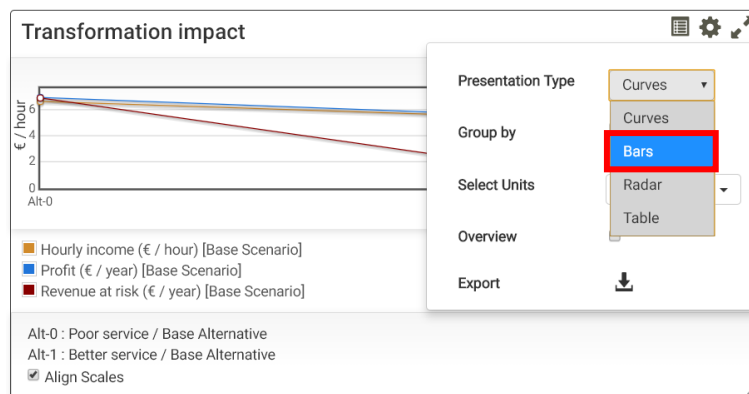
Note that, in the Curves Charts above, scale numbers on the right (for Unit € / year) look “odd”. This is because the horizontal lines are actually driven by scale numbers on the left, and the option “Align Scales” (default checked) enforces that the scale numbers on the right are shown in correspondence to

these lines. If this is not wanted, the user can opt to uncheck “Align Scales”, as is indicated in the figure below.

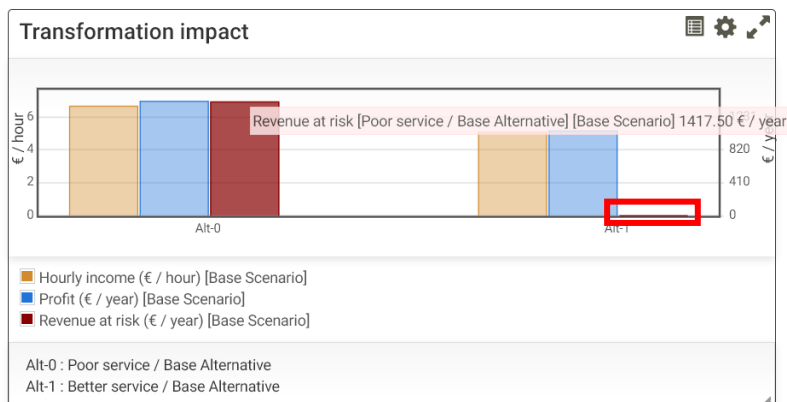


Note the result of that with respect to the scale on the right.

In a similar way we changeover to (or additionally create) a Presentation with Bars.



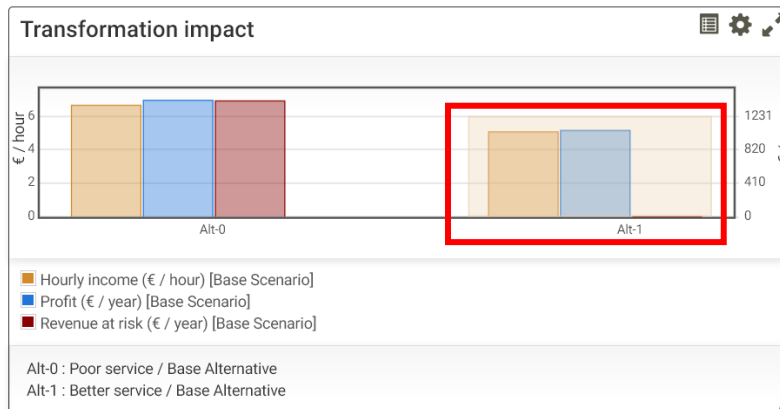
The result is represented in Bar Chart below.



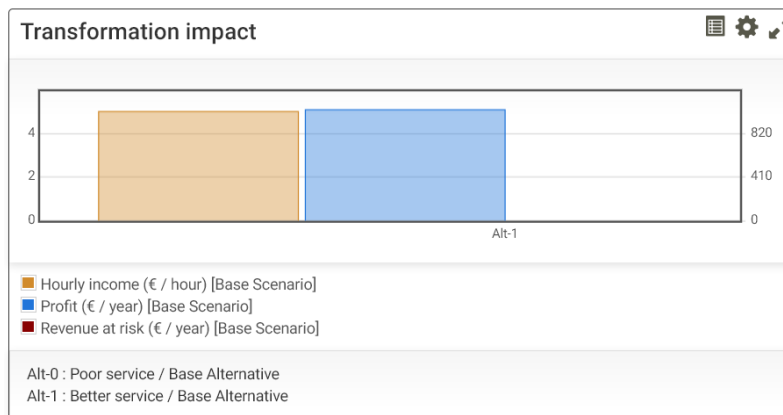
This Chart also suggests that exact Measurement values can be read from mouse-tips, obtained on mouse-over of bars. The mouse-tip in the Chart corresponds to the third bar from the left. However, as the picture also shows, mouse-over on very short bars (e.g., the bar on the far right) may not work.

This can normally be resolved by zooming into the Chart vertically. This will not help in the very case of this example of course, as the corresponding Measurement value is 0 € / year.

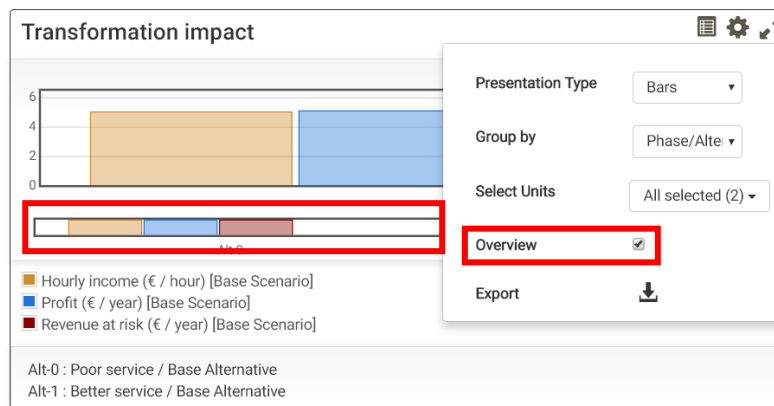
Zooming works by selecting an area of the Chart, by mouse. The result of this is shown in the next Chart.



On releasing the mouse, the Chart looks as follows:



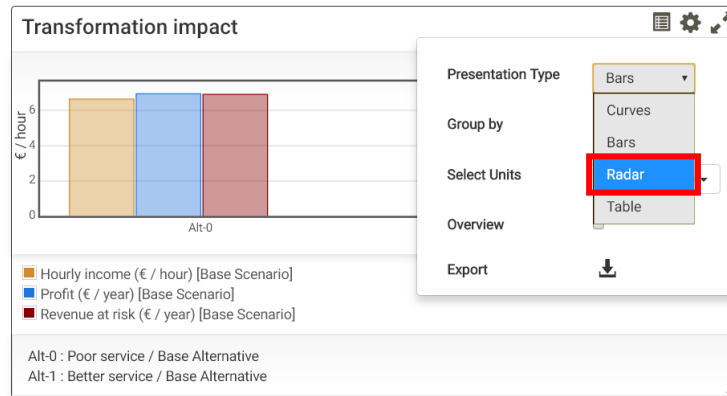
When Zooming this way, only navigation out and into the Dashboard will bring the Chart back into its original state. Therefore, to accommodate a better managed way of zooming in and zooming out, the "overview" option behind the "wheel" can be checked.



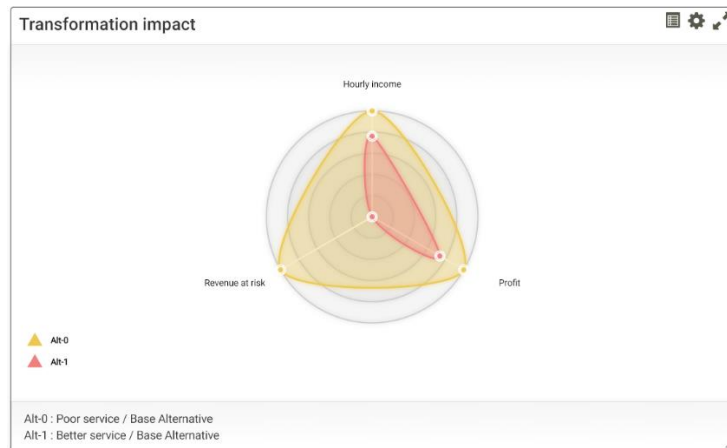
The additional “overview” below the Chart supports zooming in and out, by using the mouse in similar ways in that overview, while staying in the Dashboard.

Zooming in and out into Curves Charts works in a similar way.

In a similar way as earlier, we changeover to (or additionally create) a Presentation with a Radar.



The result is represented in Radar Chart below.



A Radar Chart can typically be used to see impact of transformation (e.g., one Phase / Alternative versus another) in a glance.

Create other Types of Presentations

It is useful to extend the Dashboard with Presentations that contribute to the understanding of the context of Value metrics. For this purpose it is useful to add one or more Presentations that show Business Canvases and/or Business Ecosystem Maps.

The Business Canvas should be available in the Plan. In order to understand how to create a Business Canvas, the reader can refer to the User Guide of [Business Canvases](#), as can be downloaded from the VDMbee website.

In order to create a Business Canvas Presentation, we start “**Create Presentation**” in the same way as demonstrated earlier, and select “Business Canvas” as Type.

Create Presentation
✕

Name*

Description

Type

Business Canvas

Select Phase*

Poor service

Select Alternative*

Base Alternative

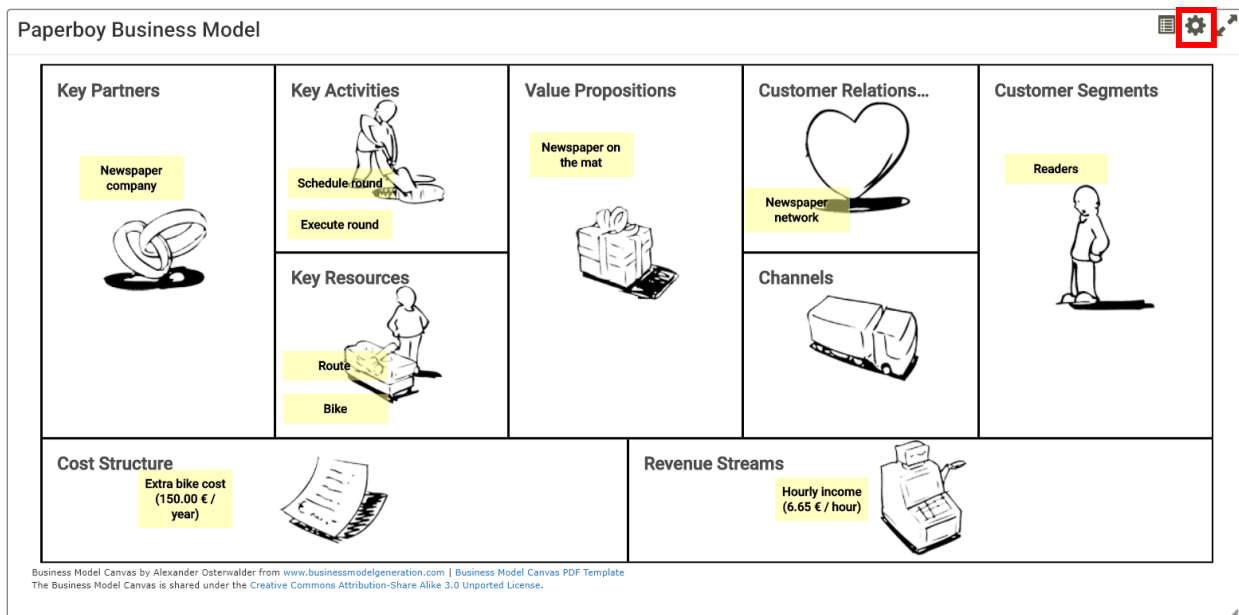
Select Business Canvas*

Paperboy (BCM)

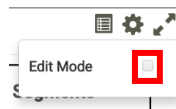
Delete

Close
Complete

The resulting Presentation, after manual upscaling, looks as follows:



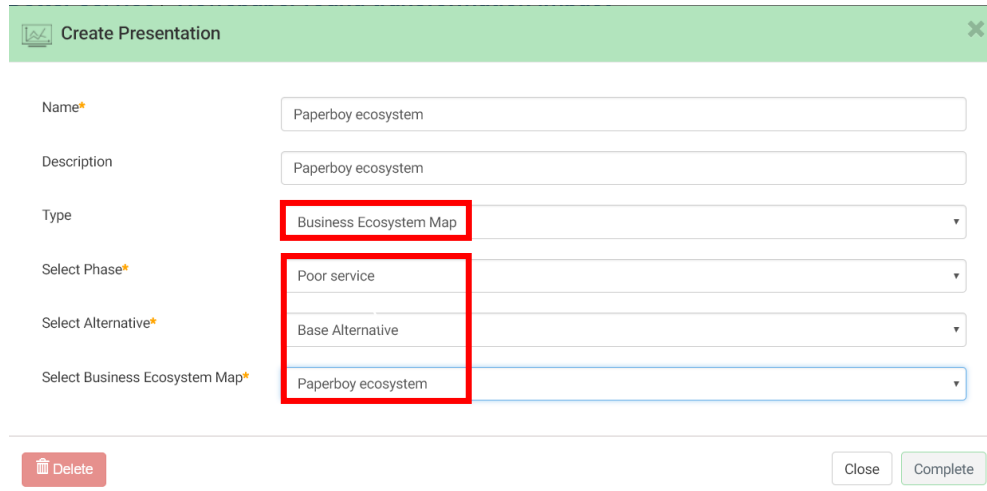
An option that is available behind the “wheel”, can be checked to enable the edit mode of the Business Canvas in the Presentation.



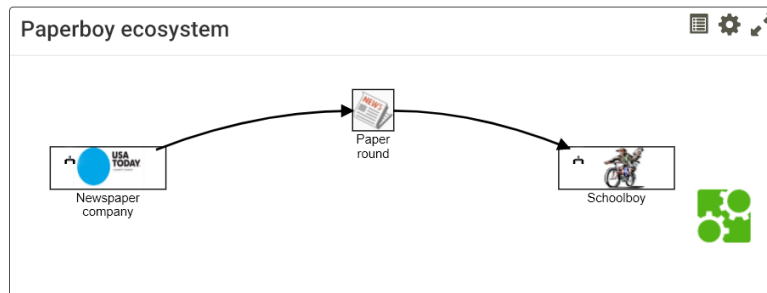
Note that, in this case, the option cannot be checked, because the Business Canvas was created in an earlier Phase/Alternative than the Dashboard has been created in. When both are contained in the same Phase/Alternative, the Business Canvas can be edited in the Presentation itself also. Note that the Business Canvas can be edited via starting the “**Business Canvas editor**” from the “**Plan page**” anyway (see User Guide of [Business Canvases](#)).

The Business Ecosystem Map should be available in the Plan too. In order to understand how to create a Business Ecosystem Map, the reader can refer to the User Guide of [Business Ecosystem Maps](#), as can be downloaded from the VDMbee website.

In order to create a Business Ecosystem Map Presentation, we start “**Create Presentation**” in the same way as demonstrated earlier, and select “Business Ecosystem Map” as Type.



The resulting Presentation, after manual resizing, looks as follows:



In the same way as has been explained for a Business Canvas Presentation above, a Business Ecosystem Map Presentation be enabled (and disabled) for editing.

It is often useful to also add explanatory text to the Dashboard. When this text is meant to explain a single Presentation in the Dashboard, it is proper to create an Annotation for that particular Presentation (see **Presentation Annotation**). But when the text is a story at Dashboard level, covering multiple Presentations, a Notes Presentation can best be created.

In order to create a Notes Presentation, we start “**Create Presentation**” in the same way as demonstrated earlier, and select “Notes” as Type.

Create Presentation

Name*

Paperboy Notes

Description

Paperboy Notes

Type

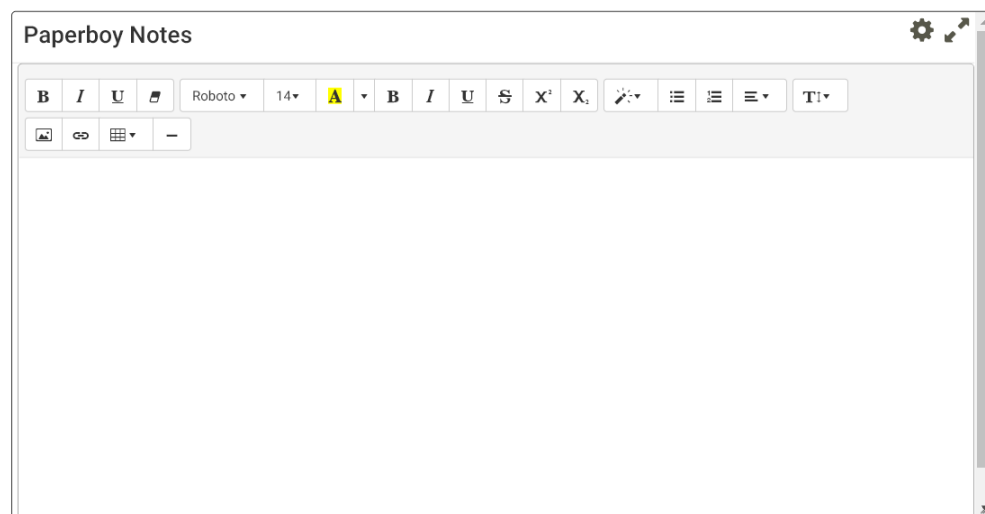
Notes

Delete

Close

Complete


The resulting Presentation looks, initially, as follows:




It starts with edit mode enabled, in which mode it behaves as a text editor. In the same way as explained above for the other types of Presentations, also here, the edit mode can be disabled (and enabled) via the “wheel”. By default it starts in edit mode. When the Presentation is opened afterwards, it starts, by default, in show mode (edit mode disabled).

The following picture shows this Notes Presentation in show model (edit mode disabled), after having added some text (and further content) to it.

Paperboy Notes



Paperboy, typically a schoolboy, distributes newspapers for a newspaper company.



He earns some money, and makes good profit, but his performance is poor. This is due to the fact that our paperboy is often not available, and then his sisters and brothers have to stand-in for him, but they will always deliver late. Because they don't like to do it .. And this lateness comes over and above the delay in supply of the newspapers by the newspaper company itself.

As a result of creating the various Presentations, as demonstrated above, the **“Presentations”** tab of the **“Dashboard editor”** page looks as follows:

Presentations





Scenarios

Details

Collaboration


Guidance

+

Transformation impact	
Paperboy Business Model	
Paperboy ecosystem	
Paperboy Notes	

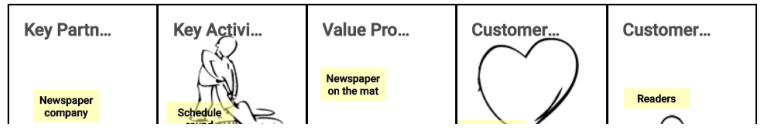
Show full Dashboard

By dragging the vertical splitter in the **“Dashboard editor”** page to the right, or by clicking the dark region on it, the right hand-side tabs area is collapsed.


My Plans / Paperboy / Better service / Newspaper round transformation impact

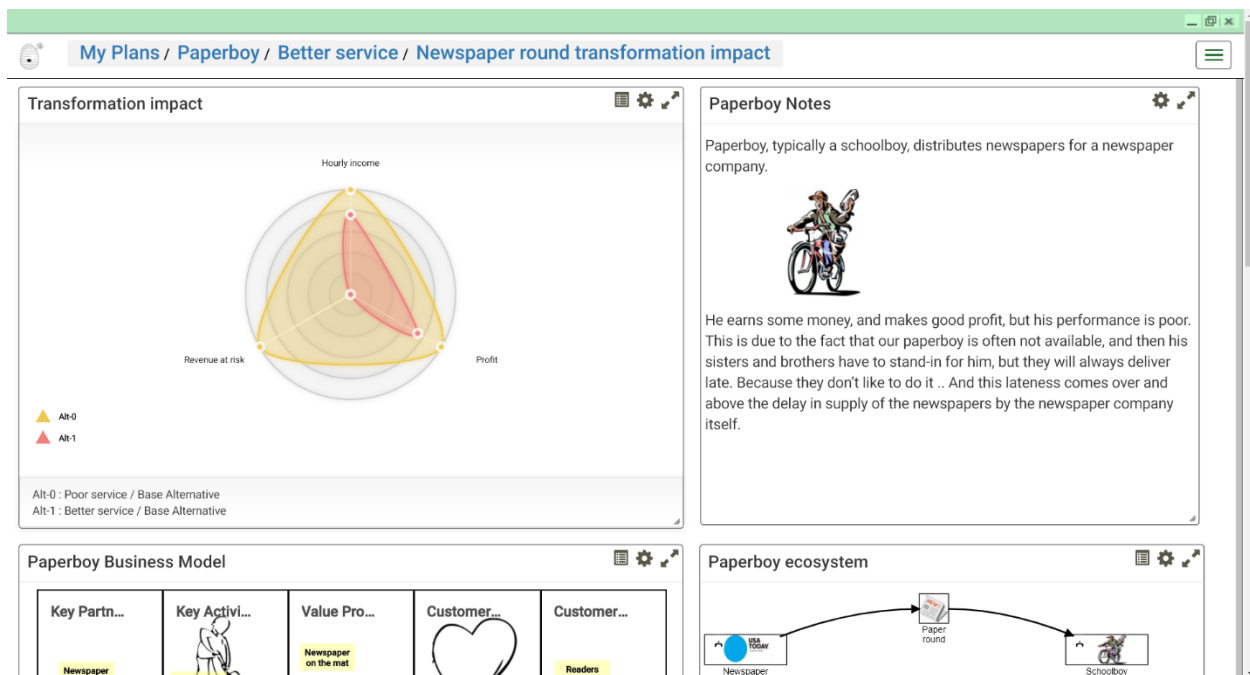
itself.

Paperboy Business Model



27

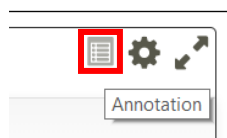
As a result of this, the Dashboard shows in full, as follows:



Note that the same is achieved by navigating out of the Dashboard (by breadcrumb), and starting the "Business Canvas editor" again from the "Plan page".

Presentation Annotation

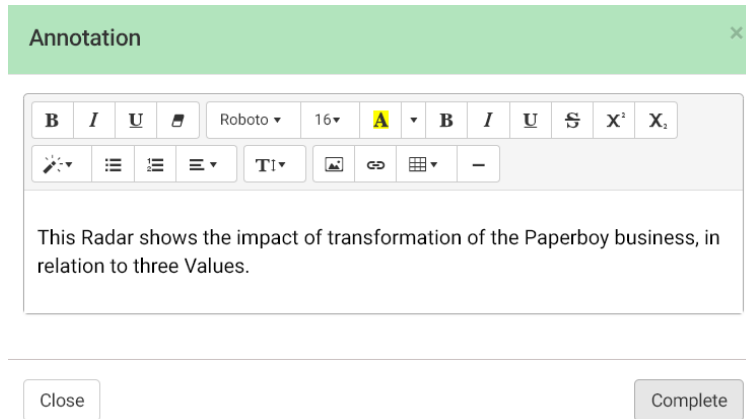
In order to document a particular Presentation, other than a Notes Presentation, an Annotation can be created for it, as follows:



Click the "Annotation" icon in the top-right corner of the Annotation. This starts the "Annotation" form.

The screenshot shows the "Annotation" form. At the top is a green title bar with the word "Annotation" and a close button (X). Below the title bar are two buttons: "Close" and "Edit". The "Edit" button is highlighted with a red box.

In order to create the actual Annotation text, the "Edit" button should be clicked, which brings the Annotation in edit mode.

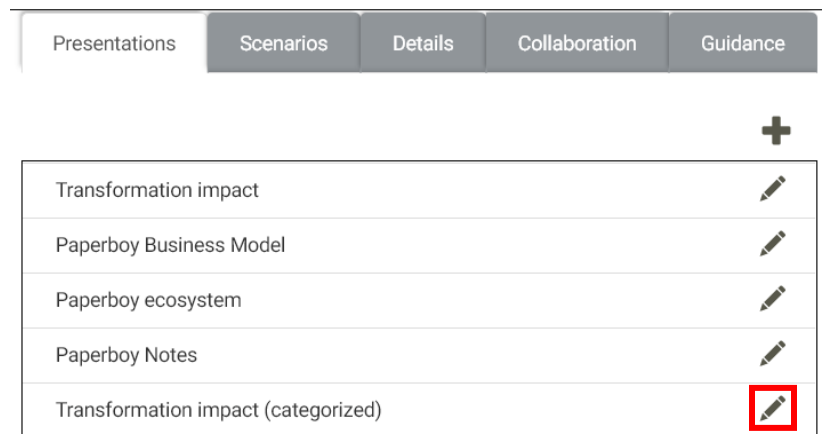


For an Annotation, when it is in edit mode, the same text editor is available as for a Notes Presentation.

Setting Labels

Via “**Create Presentation**” or “**Edit Presentation**”, for already included Alternatives and Values in the Presentation, it is possible to set labels. These labels help recognizing long names by easy and familiar names. They can also be used to categorize Values in Table Presentations.

The following picture shows the “**Presentations**” tab again. For convenience an additional Presentation, “Transformation impact (categorized)”, has been added.



Clicking the pencil on it starts “**Edit Presentation**”. Its form controls have already been explained earlier, in relation to “**Create Presentation**”.

Edit Presentation

Name*

Description

Type

	Poor service	Better service		
Values	Base Alternative / Base Scenario	Base Alternative / Base Scenario	Select Phase(s)/Alternative(s)	Select Scenario(s)
Hourly income	6.65 (€ / hour)	5.06 (€ / hour)		
Profit	1425.00 (€ / year)	1053.75 (€ / year)		
Revenue at risk	1417.50 (€ / year)	0.00 (€ / year)		
Select Value(s)				

Delete
 Copy
Close
Complete

Clicking the pencil on a Value (here “Revenue at risk”), starts “Value Properties”.

Value Properties

Name 1

Label 2

Group Label 3

Delete
 Close
Complete

4
5
6

Explanation of form controls

Control 1	Display field to show the name of the Value that has been selected in the Presentation
Control 2	Familiar name or alias, used to identify a Value in the Presentation. This is useful if the Value name would otherwise be long and/or difficult to recognize. Its use is optional.
Control 3	Name that is used to categorize the Value in a Table Presentation. It is particularly useful in case multiple Values get assigned the same label. Its use is optional.
Control 4	Button to remove the Value, as selected, from the Presentation. The same can be achieved by unchecking the Value in the list in the “ Select Value(s) ” form (see earlier).
Control 5	Leaving the form without saving data changes
Control 6	Leaving the form whereby data changes are saved

As suggested above, we fill **Control 3** with “Risk indicators”. The consequence of this is visible in the resulting Table Presentation, via a categorization band.

Transformation impact (categorized)

Search:

Values	Poor service	Better service
	Base Alternative / Base Scenario	Base Alternative / Base Scenario
Risk indicators		
Revenue at risk (€ / year)	1417.50	0.00
Uncategorized		
Hourly income (€ / hour)	6.65	5.06
Profit (€ / year)	1425.00	1053.75

Showing 1 to 3 of 3 entries

Previous 1 Next

The effect of filling **Control 2** of “**Value Properties**”, when it is filled, would be that a Value would show up with the Label instead of its name, in the Presentation. And this applies to Tables as well as to Charts.

The following picture represents “**Edit Presentation**” again.

Edit Presentation

Name* Transformation impact (categorized)

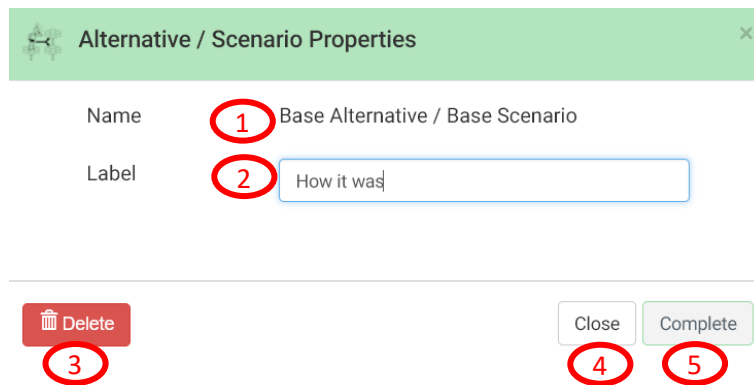
Description Transformation impact (categorized)

Type Chart/Table

Values	Poor service	Better service	Select Phase(s)/Alternative(s)	Select Scenario(s)
	Base Alternative / Base Scenario	Base Alternative / Base Scenario		
Hourly income	6.65 (€ / hour)	5.06 (€ / hour)		
Profit	1425.00 (€ / year)	1053.75 (€ / year)		
Revenue at risk	1417.50 (€ / year)	0.00 (€ / year)		
Select Value(s)				

Delete Copy Close Complete

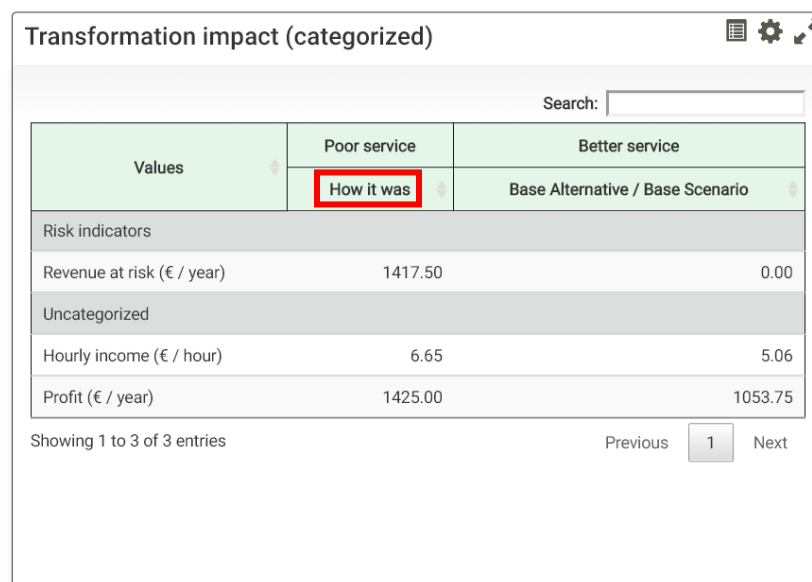
Clicking the pencil on an Alternative / Scenario, starts “**Alternative / Scenario Properties**”.



Explanation of form controls

Control 1	Display field to show the name of the Alternative / Scenario that has been selected in the Presentation
Control 2	Familiar name or alias, used to identify the Alternative / Scenario in the Presentation. This is useful if the Alternative / Scenario name would otherwise be long and/or difficult to recognize. Its use is optional.
Control 3	Button to remove the Scenario from the Presentation. Note that not just the Alternative / Scenario is removed, but the entire Scenario. The same can be achieved by unchecking the Scenario in the list in the “ Select Scenario(s) ” form (see Create Scenario).
Control 4	Leaving the form without saving data changes
Control 5	Leaving the form whereby data changes are saved

As suggested above, we fill **Control 2** with “How it was”. The consequence of this is visible in the resulting Table Presentation, via a renamed column header.



Transformation impact (categorized)		
Search: <input type="text"/>		
Values	Poor service	Better service
	How it was	Base Alternative / Base Scenario
Risk indicators		
Revenue at risk (€ / year)	1417.50	0.00
Uncategorized		
Hourly income (€ / hour)	6.65	5.06
Profit (€ / year)	1425.00	1053.75

Showing 1 to 3 of 3 entries

Previous 1 Next

Copy Presentation

The following picture represents “**Edit Presentation**” again.

Edit Presentation
✕

Name*

Description

Type

	Poor service	Better service		
Values	Base Alternative / Base Scenario	Base Alternative / Base Scenario	Select Phase(s)/Alternative(s)	Select Scenario(s)
Hourly income	6.65 (€ / hour)	5.06 (€ / hour)		
Profit	1425.00 (€ / year)	1053.75 (€ / year)		
Revenue at risk	1417.50 (€ / year)	0.00 (€ / year)		
Select Value(s)				

Delete
Copy
Close
Complete

Clicking “Copy” will trigger the creation of a copy of the Presentation. This is particularly useful when one wants to create a Presentation that is a variation of an existing Presentation in the Dashboard.

“Heatmapping”: Smilies and Corrective Actions

From the table below, transformation impact is obvious: In Phase “Better service”, “Revenue at risk” is eliminated, which is good, but this is at the expense of “Hourly income” and “Profit”. Assume that one wants to highlight that “Hourly income” should be watched. Some “heatmapping” techniques are supported to do this.

Transformation impact (categorized)

Search:

Values	Poor service	Better service
	How it was	Base Alternative / Base Scenario
Risk indicators		
Revenue at risk (€ / year)	1417.50	0.00
Uncategorized		
Hourly income (€ / hour)	6.65	5.06
Profit (€ / year)	1425.00	1053.75

Showing 1 to 3 of 3 entries
Previous
1
Next

Clicking the suspicious Measurement value will start the “Aggregation View” again.



Clicking the “Hourly income” node, to make it current, and scrolling down by the vertical scroll bar on the right, will bring the corresponding “Node Details” in focus.



Clicking the pencil behind “Hourly income” will start “**Edit Plan Value**”, aka “**Value Details**”, of which only the top part is shown below. (For the various contexts in which “**Value Details**” can be started, how it can also be started directly, independent of Dashboards, and for explanation of the use of this form in detail, see User Guide of the [VDMbee Value Management Platform](#).)

The form titled 'Edit Plan Value' contains the following fields:

- Name: Hourly income
- Enable for Measurement: ☒
- Value: 5.06, Unit: € / hour
- Value Formula: Total revenue / Total effort
- Satisfaction: fair
- Satisfaction Type: Grade
- Satisfaction Intervals: fair, -Infinity, Infinity
- Add Another: [+](#)

After creating some Satisfaction Intervals, the same form looks as follows (see User Guide of the [VDMbee Value Management Platform](#) for explanation of how to create and/or edit Satisfaction Intervals):

Edit Plan Value
✕

Name* ★

Value

Value Formula

Satisfaction

Satisfaction Type

Satisfaction Intervals* ★

Hourly income

☒ Enable for Measurement

5.06

* € / hour

✎

Total revenue / Total effort

required to watch

Grade

bad	0	4	✎	✖
required to watch	4	6	✎	✖
good	6	Infinity	✎	✖

Add Another +

Clicking the pencil behind a Satisfaction Interval will expand details of the Satisfaction Interval, as follows:

Satisfaction Intervals* ★

bad	0	4	✎	✖
required to watch	4	6	✎	✖
good	6	Infinity	✎	✖

Add Another +

Negative Infinity

Interval From* ★

From Inclusive

Positive Infinity

Interval To* ★

To Inclusive

Level* ★

Pick a color for Smiley

Corrective Action(s)

☐

4

☒

☐

6

☒

required to watch



+

-

If needed, lower costs, e.g., by more efficient route and/o: self-maintenance of bicycle

Corrective Action text has already been entered here. Clicking the **(+)** button will enable setting a smiley.



35

Pick a color for Smiley   

Corrective Action(s)

If needed, lower costs, e.g., by more efficient route and/or self-maintenance of bicycle




Clicking the smiley will enable selection of a smiley shape.

Pick a color for Smiley  

Corrective Action(s)

If needed, lower costs, e.g., by more efficient route and/or self-maintenance of bicycle


Clicking a smiley in the selection list will set the corresponding smiley shape. In addition a color can be picked for the smiley.

Pick a color for Smiley   

Corrective Action(s)








If needed, lower costs, e.g., by more efficient route and/or self-maintenance of bicycle


After clicking outside the box (to collapse the Satisfaction Interval area), the bottom part of “Value Details” looks as follows:

Satisfaction required to watch 

Satisfaction Type

Grade

Satisfaction Intervals*	bad	0	4			
	required to watch	4	6			
	good	6	Infinity			

Add Another 

Weight (%)

20





Accumulator

Product

Recipient Opinion

Recipient Opinion

 € / hour

Aggregated From	Total effort	Cost proposition	My Proposition		
	Total revenue	Revenue proposition	My Proposition		

Close


Complete

Do not forget to click “Complete” to save the data !

As a result of this, the same Presentation in the Dashboard now looks as follows:

Transformation impact (categorized)


Search:

Values	Poor service	Better service
	How it was	Base Alternative / Base Scenario
Risk indicators		
Revenue at risk (€ / year)	1417.50	0.00
Uncategorized		
Hourly income (€ / hour)	6.65	5.00 
Profit (€ / year)	1425.00	1053.75

Showing 1 to 3 of 3 entries

Previous
1
Next

Clicking the smiley will start a popup that exposes the corresponding corrective action:



Corrective Action(s)

×

If needed, lower costs, e.g., by more efficient route and/or self-maintenance of bicycle

Close

Note that, though Satisfaction Intervals, with corresponding smiley and corrective action have been created here in Phase “Better service”, these could have been created in Phase “Poor service” already. That way, different smiley(s) and or smiley color(s) could have been demonstrated for different Phases / Alternatives in the Presentation in the Dashboard.

Note also that, though “heatmapping” features have been demonstrated here, based on Dashboards, similar features are supported throughout VMP, basically in all places where Measurement values are exposed.

Export Values

Value metrics, i.e., Values, with associated Measurement values, can be exported via different formats, for different purposes. Export is also possible from multiple locations in VMP.

The following picture shows the “**Details**” tab again.

Presentations Scenarios Details Collaboration Guidance

Name

Description

Show entries Search: Add Another

Input Values	Source	Source Type	Delete
No data available in table			

Showing 0 to 0 of 0 entries Previous Next

Delete Import CSV **Export Data** Complete

Clicking button “Export Data” will start “**Export Options**”.

Export Options

Include:

- 1** ☒ Value Measurements
- 2** ☐ Recipient Opinion Measurements
- 3** ☐ Satisfaction Measurements
- 4** ☐ Weight Measurements

Select Scenario

5 ☐ Base Scenario

Select Format **6**

7 **8**

Explanation of form controls

Control 1	Checkbox to specify whether or not to include the “objective” Measurements of Values in the data that is exported (see User Guide of the VDMbee Value Management Platform for explanation Value Measurements)
Control 2	Checkbox to specify whether or not to include Recipient Opinion Measurements of Values in the data that is exported (see User Guide of the VDMbee Value Management Platform for explanation Value Measurements)
Control 3	Checkbox to specify whether or not to include Satisfaction Measurements of Values in the data that is exported (see User Guide of the VDMbee Value Management Platform for explanation Value Measurements)
Control 4	Checkbox to specify whether or not to include relative Weight Measurements of Values in the data that is exported (see User Guide of the VDMbee Value Management Platform for explanation Value Measurements)

Control 5	Checkbox(es) to specify according to which Scenario(s) to export the data. A checkbox is shown for any Scenario that is relevant in the context of the Dashboard. Note that, in the example above, so-far, there is just one Scenario available, which is the Scenario on which the Plan is based, and which exists independent of any Dashboard, and which is named “Base Scenario” by default; see Create Scenario for demonstration of creating additional Scenarios.
Control 6	Drop-down list to select the format in which data is exported. Possible formats are “csv” (comma-separated values) and “xlsx” (spreadsheet). Csv files are most appropriate for machine reading purpose. For this reason, csv files are used for import too (see Create Scenario by import). Spreadsheets (xlsx) are most appropriate for human reading purpose.
Control 7	Leaving the form without triggering any export
Control 8	Leaving the form whereby the export is actually triggered, conform selections as specified

The picture below shows how Value Measurements, according to the “Base Scenario” are exported based on xlsx format.

Export Options

Include:

- ☒ Value Measurements
- ☐ Recipient Opinion Measurements
- ☐ Satisfaction Measurements
- ☐ Weight Measurements

Select Scenario

- ☒ Base Scenario

Select Format xlsx ▾

Close
Complete

Clicking “Complete” will trigger the actual export, the resulting (“human readable”) spreadsheet of which is shown below.

User Guide – Dashboards v1.0

Paperboy.xlsx - Excel

	A	B	C	D	E	F	G
1				Poor service		Better service	
2	Value Path	Value Name	Value Type	Base Alternative#Base Scenario	Base Alternative#Base Scenario#Unit	Base Alternative#Base Scenario	Base Alternative#Base Scenario#Unit
3	Paperboy>Paperboy I	Hourly Income	Value Measurement	6.6456	€ / hour	5.0602	€ / hour
4	Paperboy>Paperboy I	Revenue at risk	Value Measurement	1417.5	€ / year	0	€ / year
5	Paperboy>Paperboy I	Profit	Value Measurement	1425	€ / year	1053.75	€ / year
6	Newspaper round Pai	Bundle size	Value Measurement	1.25	newspaper / address	1.25	newspaper / address
7	Newspaper round Pai	Fee	Value Measurement	0.02	€ / newspaper	0.02	€ / newspaper
8	Newspaper round Pai	Frequency	Value Measurement	300	rounds / year	300	rounds / year
9	Newspaper round Pai	Supply promptness	Value Measurement	96	%	96	%
10	Newspaper round Pai	Volume	Value Measurement	150	addresses	150	addresses
11	Newspaper round Pai	Tip amount	Value Measurement	3	€ / address year	3	€ / address year
12	Newspaper round Pai	Fee revenue	Value Measurement	1125	€ / year	1125	€ / year
13	Newspaper round Pai	Tip revenue	Value Measurement	450	€ / year	450	€ / year
14	Newspaper round Pai	Total revenue	Value Measurement	1575	€ / year	1575	€ / year
15	Newspaper round Pai	Availability	Value Measurement	75	%		
16	Newspaper round Pai	Coordination effort	Value Measurement	1	hour / month	1	hour / month
17	Newspaper round Pai	Execution effort	Value Measurement	1	hour / round	1	hour / round
18	Newspaper round Pai	Extra bike cost	Value Measurement	150	€ / year	150	€ / year
19	Newspaper round Pai	Total cost	Value Measurement	150	€ / year	521.25	€ / year
20	Newspaper round Pai	Total execution effort	Value Measurement	225	hours / year	299.25	hours / year
21	Newspaper round Pai	Total effort	Value Measurement	237	hours / year	311.25	hours / year
22	Newspaper round Pai	Promptness	Value Measurement	72	%	95.76	%
23	Newspaper round Pai	Receiver satisfaction	Value Measurement	10	%	100	%
24	Newspaper round Pai	Risk of loss of paper round	Value Measurement	90	%	0	%
25	Newspaper round Pai	Paperboy availability	Value Measurement			75	%
26	Newspaper round Pai	Compensation	Value Measurement			5	€ / round
27	Newspaper round Pai	Availability	Value Measurement			99	%
28	Newspaper round Pai	Net backup availability	Value Measurement			24.75	%
29	Newspaper round Pai	Net availability	Value Measurement			99.75	%
30	Newspaper round Pai	Backup cost	Value Measurement			371.25	€ / year

The picture below shows how Value Measurements, according to the “Base Scenario” are exported based on csv format.

Include:

- ☒ Value Measurements
- ☐ Recipient Opinion Measurements
- ☐ Satisfaction Measurements
- ☐ Weight Measurements

Select Scenario

☒ Base Scenario

Select Format

CSV

Close

Complete

User Guide – Dashboards v1.0

Clicking “Complete” will trigger the actual export, the result of which, also in spreadsheet format, is shown below.

	A	B	C	D	E	F	G
1	ValueName	Phase/Alternative	Scenario	Time Stamp(MMDDYYYY:HH:mm:ss)	Value	Unit	Value Type
2	Paperboy/Paperboy Plan Criterion Set:Hourly income:Hourly income Value Measurement:MC	Poor service/Base Alternative	Base Scenario		6.6456 a./year	hour	Calculated
3	Paperboy/Paperboy Plan Criterion Set:Hourly income:Hourly income Value Measurement:MC	Better service/Base Alternative	Base Scenario		5.0602 a./year	hour	Calculated
4	Paperboy/Paperboy Plan Criterion Set:Revenue at risk:Revenue at risk Value Measurement:MC	Poor service/Base Alternative	Base Scenario		1417.5 a./year	year	Calculated
5	Paperboy/Paperboy Plan Criterion Set:Revenue at risk:Revenue at risk Value Measurement:MC	Better service/Base Alternative	Base Scenario		1417.5 a./year	year	Calculated
6	Paperboy/Paperboy Plan Criterion Set:Profit:Profit Value Measurement:MC	Poor service/Base Alternative	Base Scenario		1425 a./year	year	Calculated
7	Paperboy/Paperboy Plan Criterion Set:Profit:Profit Value Measurement:MC	Better service/Base Alternative	Base Scenario		1063.75 a./year	year	Calculated
8	Newspaper round Package/Newspaper network/Publisher/Paper round:Bundle size:Bundle size Value Measurement:MC	Poor service/Base Alternative	Base Scenario		125 newspaper / address	address	Input
9	Newspaper round Package/Newspaper network/Publisher/Paper round:Bundle size:Bundle size Value Measurement:MC	Better service/Base Alternative	Base Scenario		125 newspaper / address	address	Input
10	Newspaper round Package/Newspaper network/Publisher/Paper round:Fee:Fee Value Measurement:MC	Poor service/Base Alternative	Base Scenario		0.02 a./year	newspaper	Input
11	Newspaper round Package/Newspaper network/Publisher/Paper round:Fee:Fee Value Measurement:MC	Better service/Base Alternative	Base Scenario		0.02 a./year	newspaper	Input
12	Newspaper round Package/Newspaper network/Publisher/Paper round:Frequency:Frequency Value Measurement:MC	Poor service/Base Alternative	Base Scenario		300 rounds / year	year	Input
13	Newspaper round Package/Newspaper network/Publisher/Paper round:Frequency:Frequency Value Measurement:MC	Better service/Base Alternative	Base Scenario		300 rounds / year	year	Input
14	Newspaper round Package/Newspaper network/Publisher/Paper round:Supply prompness:Supply prompness Value Measurement:MC	Poor service/Base Alternative	Base Scenario		96 %		Input
15	Newspaper round Package/Newspaper network/Publisher/Paper round:Supply prompness:Supply prompness Value Measurement:MC	Better service/Base Alternative	Base Scenario		96 %		Input
16	Newspaper round Package/Newspaper network/Publisher/Paper round:Volume:Volume Value Measurement:MC	Poor service/Base Alternative	Base Scenario		150 addresses	addresses	Input
17	Newspaper round Package/Newspaper network/Publisher/Paper round:Volume:Volume Value Measurement:MC	Better service/Base Alternative	Base Scenario		150 addresses	addresses	Input
18	Newspaper round Package/Newspaper network/Subscriber/Tip:Tip amount:Tip amount Value Measurement:MC	Poor service/Base Alternative	Base Scenario		3 a./address year	year	Input
19	Newspaper round Package/Newspaper network/Subscriber/Tip:Tip amount:Tip amount Value Measurement:MC	Better service/Base Alternative	Base Scenario		3 a./address year	year	Input
20	Newspaper round Package/Newspaper network/Paperboy/Revenue proposition:Fee revenue:Fee revenue Value Measurement:MC	Poor service/Base Alternative	Base Scenario		125 a./year	year	Calculated
21	Newspaper round Package/Newspaper network/Paperboy/Revenue proposition:Fee revenue:Fee revenue Value Measurement:MC	Better service/Base Alternative	Base Scenario		125 a./year	year	Calculated
22	Newspaper round Package/Newspaper network/Paperboy/Revenue proposition:Tip revenue:Tip revenue Value Measurement:MC	Poor service/Base Alternative	Base Scenario		450 a./year	year	Calculated
23	Newspaper round Package/Newspaper network/Paperboy/Revenue proposition:Tip revenue:Tip revenue Value Measurement:MC	Better service/Base Alternative	Base Scenario		450 a./year	year	Calculated
24	Newspaper round Package/Newspaper network/Paperboy/Revenue proposition:Total revenue:Total revenue Value Measurement:MC	Poor service/Base Alternative	Base Scenario		1575 a./year	year	Calculated
25	Newspaper round Package/Newspaper network/Paperboy/Revenue proposition:Total revenue:Total revenue Value Measurement:MC	Better service/Base Alternative	Base Scenario		1575 a./year	year	Calculated
26	Newspaper round Package/Newspaper network/Schedule round:Schedule round port:Availability:Availability Value Measurement:MC	Poor service/Base Alternative	Base Scenario		75 %		Input
27	Newspaper round Package/Newspaper network/Schedule round:Schedule round port:Coordination effort:Coordination effort Value Measurement:MC	Poor service/Base Alternative	Base Scenario		1 hour / month	month	Input
28	Newspaper round Package/Newspaper network/Schedule round:Schedule round port:Coordination effort:Coordination effort Value Measurement:MC	Better service/Base Alternative	Base Scenario		1 hour / month	month	Input
29	Newspaper round Package/Newspaper network/Execute round:Execute round port:Execution effort:Execution effort Value Measurement:MC	Poor service/Base Alternative	Base Scenario		1 hour / round	round	Input
30	Newspaper round Package/Newspaper network/Execute round:Execute round port:Execution effort:Execution effort Value Measurement:MC	Better service/Base Alternative	Base Scenario		1 hour / round	round	Input
31	Newspaper round Package/Newspaper network/Execute round:Execute round port:Extra bike cost:Extra bike cost Value Measurement:MC	Poor service/Base Alternative	Base Scenario		150 a./year	year	Input
32	Newspaper round Package/Newspaper network/Execute round:Execute round port:Extra bike cost:Extra bike cost Value Measurement:MC	Better service/Base Alternative	Base Scenario		150 a./year	year	Input
33	Newspaper round Package/Newspaper network/Paperboy/Cost proposition:Total cost:Total cost Value Measurement:MC	Poor service/Base Alternative	Base Scenario		521.25 a./year	year	Calculated
34	Newspaper round Package/Newspaper network/Paperboy/Cost proposition:Total cost:Total cost Value Measurement:MC	Better service/Base Alternative	Base Scenario		521.25 a./year	year	Calculated
35	Newspaper round Package/Newspaper network/Paperboy/Cost proposition:Total execution effort:Total execution effort Value Measurement:MC	Poor service/Base Alternative	Base Scenario		225 hours / year	year	Calculated
36	Newspaper round Package/Newspaper network/Paperboy/Cost proposition:Total execution effort:Total execution effort Value Measurement:MC	Better service/Base Alternative	Base Scenario		225 hours / year	year	Calculated
37	Newspaper round Package/Newspaper network/Paperboy/Cost proposition:Total effort:Total effort Value Measurement:MC	Poor service/Base Alternative	Base Scenario		311.25 hours / year	year	Calculated
38	Newspaper round Package/Newspaper network/Paperboy/Cost proposition:Total effort:Total effort Value Measurement:MC	Better service/Base Alternative	Base Scenario		311.25 hours / year	year	Calculated
39	Newspaper round Package/Newspaper network/Paperboy/Newspaper on the mat:Prompness:Prompness Value Measurement:MC	Poor service/Base Alternative	Base Scenario		72 %		Calculated
40	Newspaper round Package/Newspaper network/Paperboy/Newspaper on the mat:Prompness:Prompness Value Measurement:MC	Better service/Base Alternative	Base Scenario		95.75 %		Calculated
41	Newspaper round Package/Newspaper network/Paperboy/Newspaper on the mat:Receiver satisfaction:Receiver satisfaction Value Measurement:MC	Poor service/Base Alternative	Base Scenario		10 %		Calculated
42	Newspaper round Package/Newspaper network/Paperboy/Newspaper on the mat:Receiver satisfaction:Receiver satisfaction Value Measurement:MC	Better service/Base Alternative	Base Scenario		100 %		Calculated
43	Newspaper round Package/Newspaper network/Paperboy/Risk proposition:Risk of loss of paper round:Risk of loss of paper round Value Measurement:MC	Poor service/Base Alternative	Base Scenario		90 %		Calculated
44	Newspaper round Package/Newspaper network/Paperboy/Risk proposition:Risk of loss of paper round:Risk of loss of paper round Value Measurement:MC	Better service/Base Alternative	Base Scenario		0 %		Calculated
45	Newspaper round Package/Newspaper network/Schedule round:Schedule round port:Paperboy availability:Paperboy availability Value Measurement:MC	Poor service/Base Alternative	Base Scenario		75 %		Input
46	Newspaper round Package/Backup network/Proxy:Delivery work:Compensation:Compensation Value Measurement:MC	Better service/Base Alternative	Base Scenario		5 a./round	round	Input
47	Newspaper round Package/Backup network/Proxy:Delivery work:Compensation:Compensation Value Measurement:MC	Poor service/Base Alternative	Base Scenario		98 %		Input
48	Newspaper round Package/Newspaper network/Execute round:Execute round port:Net backup availability:Net backup availability Value Measurement:MC	Better service/Base Alternative	Base Scenario		24.75 %		Calculated
49	Newspaper round Package/Newspaper network/Execute round:Execute round port:Net backup availability:Net backup availability Value Measurement:MC	Poor service/Base Alternative	Base Scenario		99.75 %		Calculated
50	Newspaper round Package/Newspaper network/Paperboy/Cost proposition:Backup cost:Backup cost Value Measurement:MC	Better service/Base Alternative	Base Scenario		371.25 a./year	year	Calculated

Note that column “Time Stamp” is left empty on export. This column serves purpose when importing Value Measurements (see **Monitoring & Control**).

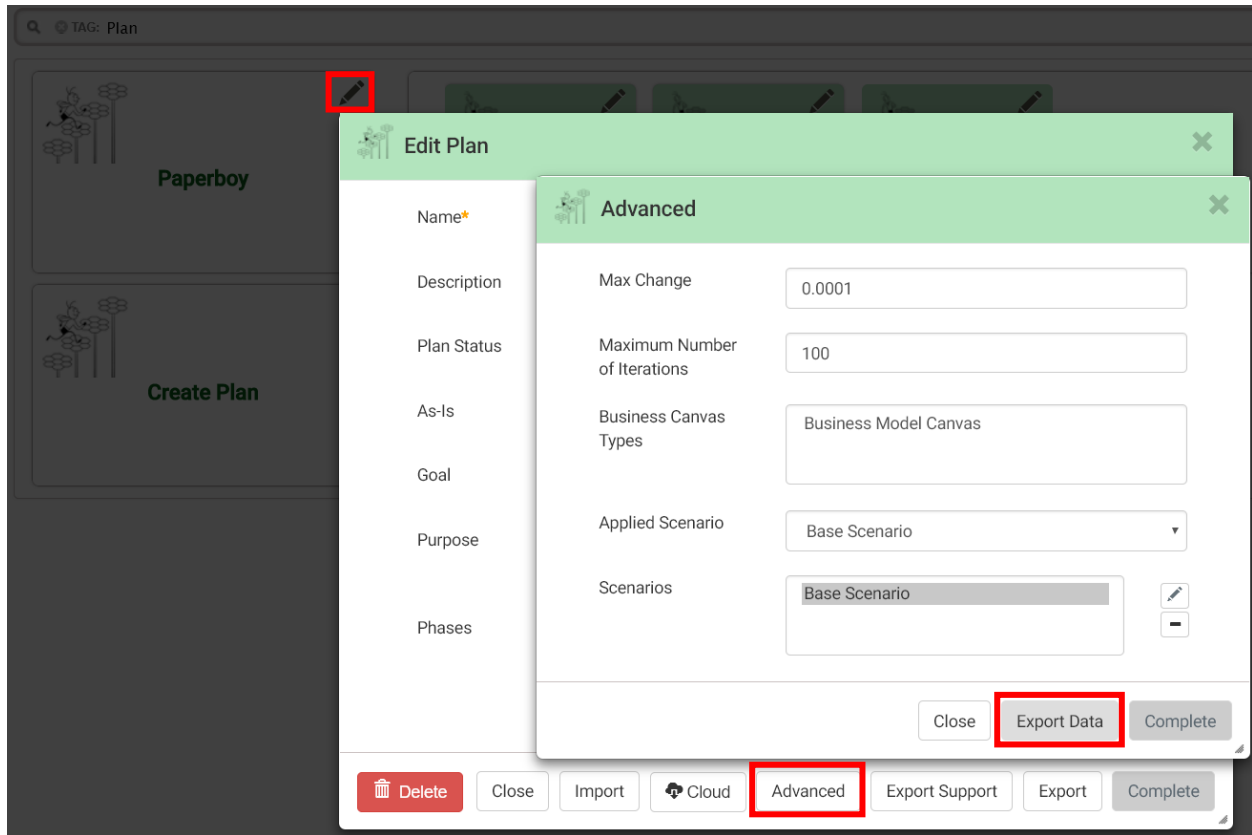
Similar export possibilities also exist in other places in VMP.

One additional place to export via the menu behind the “wheel” in a Presentation:



Clicking the export button will start the same “**Export Options**” form as demonstrated above. Only: when triggering export from a Presentation, the scope of data, in terms of Scenarios, will be the same as the scope that is selected for the Presentation itself. Hence no checkboxes to select Scenarios will be available in “**Export Options**”, when started this way.

Another place to export Value Measurements, is via the “Export Data” button in the “**Advanced**” form, as can be started via button “Advanced” in “**Edit Plan**”, which is started via the pencil on the Plan header box in the “**My Plans**” page, as follows:



When “**Export Options**” is started this way, it behaves the same way (same scope selections), as when it is started from the “**Details**” tab in the Dashboard.

Create Scenario

Values are either calculated (aggregated from other Values), or they are Input Values. Input Values require their Measurement value to be entered manually, or by import (see **Create Scenario by import**).

For a Plan, what-if experiments can be conducted, by varying Input Values, which will trigger real-time re-calculation of calculated Values.

Editing the full set of Input Values is possible via the “**Input Values**” form as can be started via button “Input Values” in “**Edit Alternative**”, which is started from “**Edit Phase**” (which, in turn, is started via the pencil on the **green** Phase box in the Plan lane on “**My Plans**”), as follows:

Edit Phase

Name* Better service

Description

Plan Date

Edit Alternative

Name* Base Alternative

Input Values

Search:

Values	Base Alternative
Availability	99.00 (%)
Bundle size	1.25 (newspaper / address)
Compensation	5.00 (€ / round)
Coordination effort	1.00 (hour / month)
Execution effort	1.00 (hour / round)
Extra bike cost	150.00 (€ / year)
Fee	0.02 (€ / newspaper)

Showing 1 to 7 of 12 entries

Previous 1 2 Next

Input Values Complete

Close Complete

Editing Input Values via “**Input Values**” is only supported for the “applied” Scenario, which is, by default, the “Base Scenario” (see **Apply Scenario**).

This means that, when one wants to do multiple what-if experiments, results are over-written by each experiment. It is often desirable, however, to separately store what-if experiments, so that they can be compared with each other. This comparison is best supported by Presentations in a Dashboard. A Dashboard typically requires sensitivity analysis by means of what-if experiments, in order to give stakeholders a feel about impact in their specific situation, now and in the future. On the other hand, what-if experiments require a dashboard to demonstrate their impact, and to compare them. For this reason Scenarios can be created in association with the Dashboard.

Dashboard-based Scenarios are meant as easy experiments to/with the stakeholders or customers. Input Values for a Plan, as demonstrated above, may be many, especially in real-world-sized Plans. In order to make experimenting with Scenarios easy, it is possible to select a sub-set of Input Values for a Dashboard, so that the user is able to focus what-if experiments on those Input Values that matter most, and is able to conduct what-if experiments easily and quickly.

For this purpose, on the “**Details**” tab of the “**Dashboard editor**”, click the **(+)** button, to add (i.e., select) one or more Input Values, as follows:

Presentations
Scenarios
Details
Collaboration
Guidance

Name
Newspaper round transformation impact

Description
Newspaper round transformation impact

Show 5 entries
Search:
Add Another

Input Values	Source	Source Type	Delete
No data available in table			

Showing 0 to 0 of 0 entries
Previous
Next

Delete
Import CSV
Export Data
Complete

This starts the “**Select Value(s)**” form, which is the same form as was used earlier to select Values for a Presentation.

Select Value(s)

☐ Value

☐ Availability

☐ Bundle size

☒ Compensation

☐ Coordination effort

☐ Execution effort

☐ Extra bike cost

☐ Fee

☐ Frequency

☐ Paperboy availability

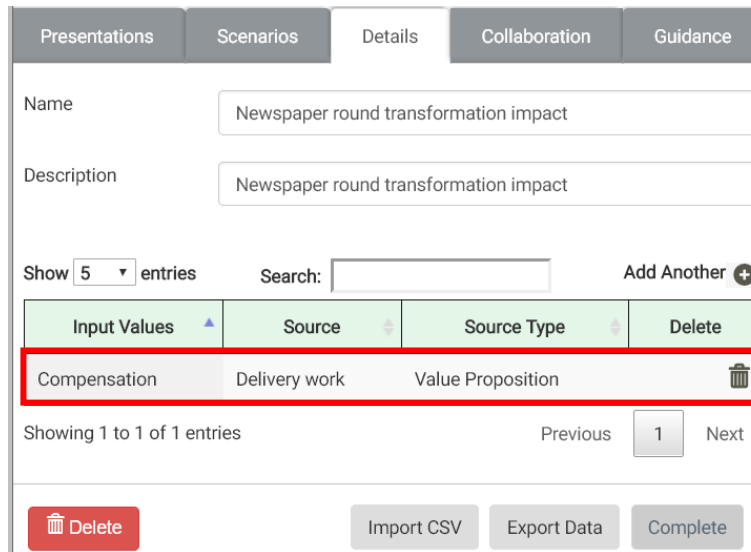
☐ Supply promptness

☐ Tip amount

☐ Volume

Close
Complete

Input Value “Compensation” is selected, in order to analyze how sensitive the Plan is towards variations of compensation, as paid to the Schoolmates that provide backup to the Paperboy. After checking it, and clicking “Complete”, the result is show in the “**Details**” tab as follows:



Presentations Scenarios **Details** Collaboration Guidance

Name Newspaper round transformation impact

Description Newspaper round transformation impact

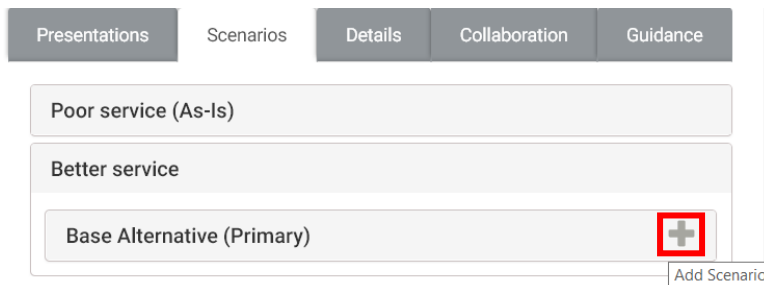
Show 5 entries Search: Add Another +

Input Values	Source	Source Type	Delete
Compensation	Delivery work	Value Proposition	

Showing 1 to 1 of 1 entries Previous 1 Next

Delete Import CSV Export Data Complete

Scenarios can be created via the “**Scenarios**” tab of the “**Dashboard editor**” page.



Presentations Scenarios **Details** Collaboration Guidance

Poor service (As-Is)

Better service

Base Alternative (Primary)

Add Scenario

Clicking the “+” icon starts “**Create Scenario**”:

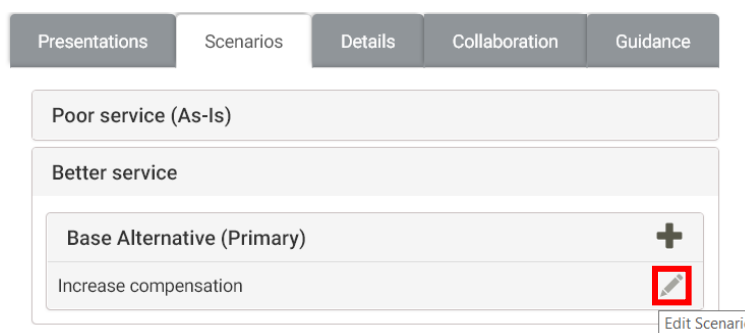


Create Scenario

Name Increase compensation

Close Complete

After entry of the name of the Scenario, and clicking “**Complete**”, the “**Details**” tab looks as follows:



Presentations Scenarios **Details** Collaboration Guidance

Poor service (As-Is)

Better service

Base Alternative (Primary)

Increase compensation

Edit Scenario

Note that the Scenario has now been created in the “band” of Phase “Better service” (in its Alternative “Base Alternative”). If wanted, it could have been created in the first Phase (“Poor service”) instead, when its band would have been expanded. With that it has been created in Phase “Better service”, this Phase has been selected as starting point for the Scenario. This implies the intention to analyze the impact of the Scenario in Phase “Better service” and any (potentially) future Phase after that. The “history” prior to the starting point, in the example Phase “Poor service”, is assumed to be less relevant.

Clicking the pencil behind the Scenario name starts “Edit Scenario”:

The screenshot shows the 'Edit Scenario' form with the following elements highlighted by numbered red circles:

- 1**: Input field for the Scenario name, containing 'Increase compensation'.
- 2**: Table header 'Input Values'.
- 3**: Search input field.
- 4**: Checkbox labeled 'Show All Phases'.
- 5**: Table header 'Better service'.
- 6**: Pencil icon in the 'Compensation' row.
- 7**: Paging controls showing 'Previous', '1', and 'Next'.
- 8**: 'Delete' button.
- 9**: 'Apply' button.
- 10**: 'Close' button.
- 11**: 'Complete' button.

Explanation of form controls

Control 1	Input field to edit the name of the Scenario
Control 2	Table to display Input Values, as selected for what-if experiments in the Dashboard, and to edit their Measurements
Control 3	Control to search Input Values in the table. This is useful in case many Input Values are included. It works as a filter, based on text-based matching (“typeahead search”).
Control 4	Checkbox to indicate whether or not to show (and edit-enable) Input Value Measurements in history Phase(s), i.e., in Phases prior to the starting point (as explained earlier). It is unchecked by default, which means: by default, “history” is not shown.
Control 5	Control to order the content of the Table based on the corresponding column. Default ordering is ascending. As long as a column header is not clicked, the control shows as combined soft arrow up and arrow down. When clicking it once, it shows as clear arrow up (indicating ascending order). When clicking it another time, it shows as clear arrow down (indicating descending order). When clicking another column header, it shows as soft combined arrow again.
Control 6	Pencil to bring the Input Value Measurement in edit mode (see below)
Control 7	Paging control, to step through sets of rows (Input Values) in the Table
Control 8	Button to delete the Scenario
Control 9	Button to “apply” the Scenario; see Apply Scenario
Control 10	Leaving the form without saving data changes

Control 11	Leaving the form whereby data changes are saved
-------------------	---

Clicking the pencil (**Control 6**) brings the Input Value Measurement in edit mode, as follows:

The screenshot shows the 'Edit Scenario' interface. At the top, there's a green header bar with a plant icon and the text 'Edit Scenario'. Below it, a search bar contains the text 'Increase compensation'. A 'Search:' field is also present. To the right, there's a checkbox labeled 'Show All Phases'. The main content area is a table with two columns: 'Input Values' and 'Better service'. The 'Input Values' column has a sub-row 'Base Alternative'. The 'Compensation' row shows a value of '10.00' in a blue box, and a checkmark icon in a red box. Below the table, it says 'Showing 1 to 1 of 1 entries'. At the bottom, there are buttons: 'Delete', 'Apply', 'Close', and 'Complete' (highlighted with a red box).

As shown in the picture above, the Measurement value is (manually) doubled. After clicking the ✓ icon and clicking “Complete”, the recalculation is triggered in real-time.

IMPORTANT: As Scenario data spreads throughout the Plan, for real-world size Plans, a Scenario may contain a lot of data. For performance reasons a limit has been imposed on the number of Scenarios that can be created in VMP. For now this limit has been set to five. Maximally five Scenarios can be created therefore. When one wants to create more Scenarios, first some older Scenarios will have to be deleted.

We now proceed with adding the newly created Scenario to Presentations, starting with a Table. The next picture shows the “**Presentations**” tab again.

Presentations	Scenarios	Details	Collaboration	Guidance
+				
Transformation impact				
Paperboy Business Model				
Paperboy ecosystem				
Paperboy Notes				
Transformation impact (categorized)				

Clicking the pencil behind the Presentation starts “**Edit Presentation**”.

Edit Presentation

Name*
Transformation impact (categorized)

Description
Transformation impact (categorized)

Type
Chart/Table

	Poor service	Better service		
Values	Base Alternative / Base Scenario	Base Alternative / Base Scenario	Select Phase(s)/Alternative(s)	Select Scenario(s)
Hourly income	6.65 (€ / hour)	5.06 (€ / hour)		
Profit	1425.00 (€ / year)	1053.75 (€ / year)		
Revenue at risk	1417.50 (€ / year)	0.00 (€ / year)		
Select Value(s)				

Delete

Copy

Close

Complete

Clicking the (+) button to select Scenario(s), starts “Select Scenario(s)”:

Select Scenario(s)

☒ Scenario

☒ Base Scenario (Applied)

☒ Increase compensation

Close

Complete

After checking the check box for Scenario “Increase compensation”, or the top-level checkbox to select all Scenarios, followed by clicking “Complete”, as well as clicking “Complete” in “Edit Presentation” itself, the “Transformation impact (categorized)” Presentation looks as follows:

Transformation impact (categorized)

Search:

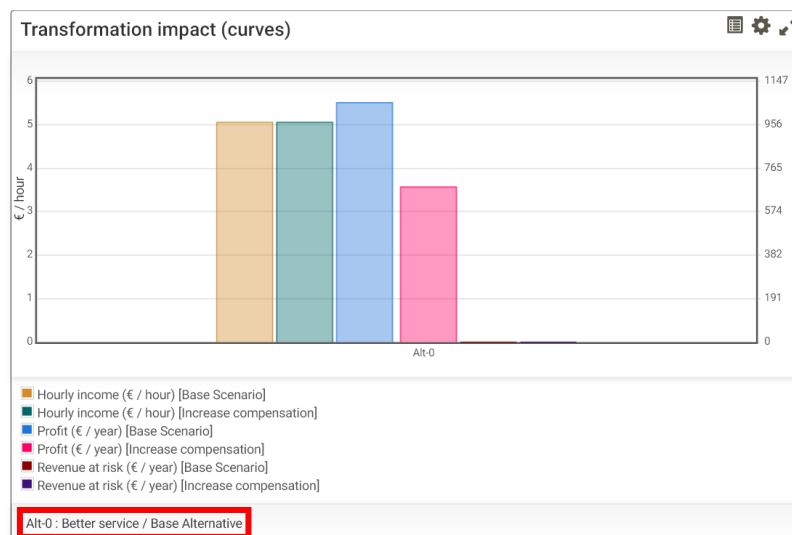
Values	Poor service		Better service	
	How it was	Base Alternative / Increase compensation	Base Alternative / Base Scenario	Base Alternative / Increase compensation
Risk indicators				
Revenue at risk (€ / year)	1417.50	1417.50	0.00	0.00
Uncategorized				
Hourly income (€ / hour)	6.65	6.65	5.06 😊	5.06 😊
Profit (€ / year)	1425.00	1425.00	1053.75	682.50

Showing 1 to 3 of 3 entries

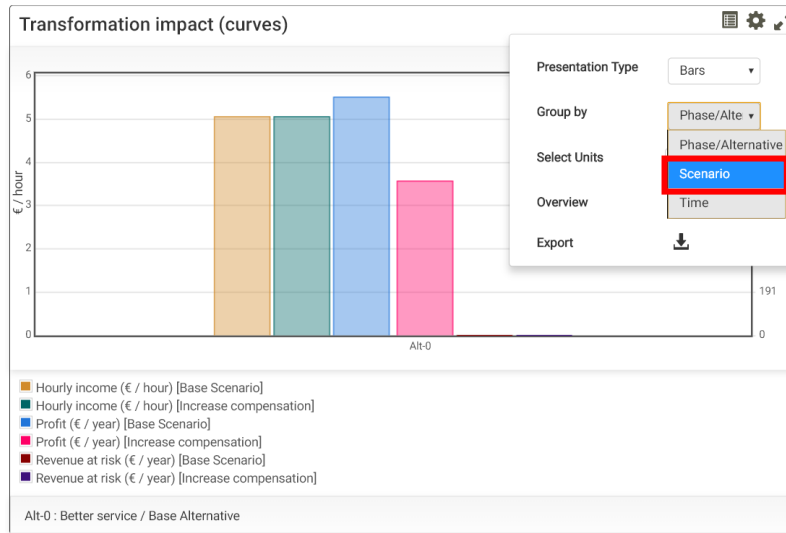
Previous 1 Next

As the table demonstrates, and as is also expected, “Profit” is lower in Phase “Better service”, for the new Scenario. This is due to the payment of compensation.

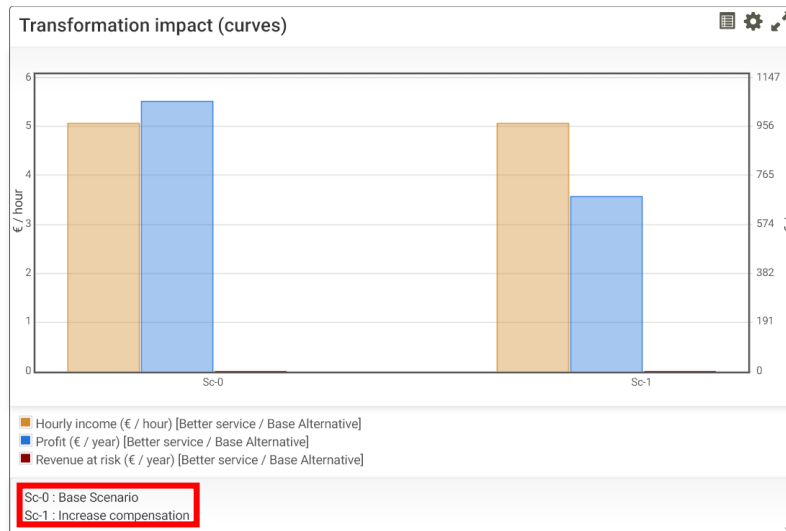
Note that, as the Scenario, the way it has been defined, has no impact on the first Phase, the data in the Presentation can be downsized by removing the first Phase from it (in a way as explained earlier). The next Presentation shows the resulting data in a Bar Chart. It is still organized by Phase / Alternative. Note that “Revenue at risk” equals 0 € / year. This Chart was simply created by copying the Table Presentation, de-selecting the second Phase from it, followed by changing its Presentation Type from “Table” to “Bars”, in ways as demonstrated earlier in this User Guide.



It is also possible to view the same data as organized by Scenario. For this purpose, click the “wheel” in the Presentation, and select “Group by” “Scenario”, as indicated below.



The result of this shows the Bar Chart as organized by Scenario.



In similar ways Curves Chart and Radar Chart Presentations can be created, organized by Phase / Alternative and by Scenario. This is not further demonstrated in this User Guide.

As appeared above, the “Group by” drop-down list also includes “Time” as option. The use of “Time Charts” will be demonstrated later (see **Compare Actuals versus Plan**).

Apply Scenario

In VMP there is one Scenario that is independent of any Dashboard. This is the so-called “applied” Scenario (see **Apply Scenario**). This is the Scenario on which the Plan is based. Initially, this Scenario is auto-created, and is called the “Base Scenario”. The “Advanced” form, which has been demonstrated earlier (see **Export Values**), also exposes this Scenario, as indicated below.

Advanced

Max Change

Maximum Number of Iterations

Business Canvas Types

Applied Scenario **1**

Scenarios **2**

3 **4**

Explanation of form controls

Control 1	Drop-down list to show the currently applied Scenario, and to select a different Scenario, to become the applied one. Note that the regular way to “apply” a Scenario is via “Edit Scenario” in a Dashboard.
Control 2	Multi-select box to show the currently available Scenarios in the Plan, and to enable selection of Scenario for the purpose of changing its name (via Control 3) or removing it from the Plan (via Control 4).
Control 3	Button to edit the name of the Scenario, as selected via Control 2
Control 4	Button to remove (delete) the Scenario, as selected via Control 2 . The applied Scenario itself cannot be deleted.

Assume that, in similar ways as demonstrated above (see **Create Scenario**) multiple Scenarios would have been created and analyzed (compared), and that one of them would be considered best, even better than the until then “applied” Scenario (likely the “Base Scenario”). In that case, one may want to “apply” that best Scenario.

This is demonstrated here for Scenario “Increase compensation”, as created above. The following picture shows **“Edit Scenario”**, as opened on that Scenario, again:

Edit Scenario

Scenario*

Increase compensation

Search:

Show All Phases

Input Values	Better service
	Base Alternative
Compensation	10.00 (€ / round)

Showing 1 to 1 of 1 entries

Previous
1
Next

Delete

Apply

Close

Complete

Clicking button “Apply” will trigger a question, as prompted to the user, asking the user whether (s)he really wants to replace the currently applied Scenario with the new one.

Applying Scenario will replace the currently applied Scenario. Are you sure you want to continue ?

Cancel

OK


Clicking “Cancel” would stop applying the new Scenario. Clicking “OK” will trigger prompting the next question to the user, asking whether the replaced Scenario would also need to be deleted, as follows:

Do you want to delete the replaced Scenario ?

Cancel

OK

As we intend to revert back to the originally applied Scenario afterwards (for the sake of this User Guide), we click “OK” on the first question, and “Cancel” on the second. The result of this, after clicking “Complete” in both “Advanced” and “Edit Plan”, can be observed via “Advanced”, as follows:


Advanced
✕

Max Change

Maximum Number of Iterations



Business Canvas Types

Applied Scenario

Increase compensation

Scenarios

Base Scenario
Increase compensation





Close Export Data Complete

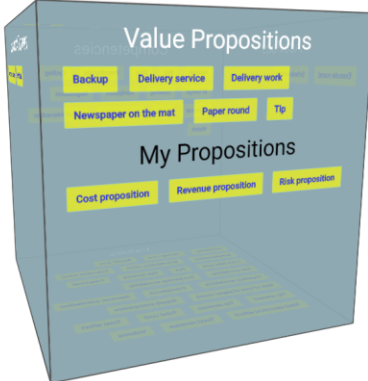
In order to prove that “Increased compensation” is indeed the “applied” Scenario, navigate, e.g., into the **“Business Model Cube page”**, and notice how “Compensation” does indeed have Measurement value of 10.00 € /round, the value that was specified for Scenario “Increase compensation” above. See the User Guide of the [VDMbee Value Management Platform](#) for how to navigate there.























My Plans / Paperboy / Better service / Newspaper round

Newspaper round




Start



Progress	BM Values	BM Details	Collaboration	Guidance
Poor service (As-Is)				
Better service				
Base Alternative (Primary)				
Backup cost	742.50 € / year			
Compensation	10.00 € / round			
Fee revenue	1125.00 € / year			
Promptness	95.76 %			
Receiver satisfaction	100.00 %			
Risk of loss of paper round	0.00 %			
Tip revenue	450.00 € / year			
Total cost	892.50 € / year			
Total effort	311.25 hours / year			
Total execution effort	299.25 hours / year			
Total revenue	1575.00 € / year			

For now, we revert the change so that the “applied” Scenario is “Base Scenario” again, as follows:


Advanced
✕

Max Change

Maximum Number of Iterations

Business Canvas Types

Applied Scenario

▼

Scenarios

Close

Export Data

Complete

Do not forget to click “Complete” in “**Advanced**”, as well as in “**Edit Plan**” !

Monitoring & Control

After the Plan, or a particular Phase of the Plan has been implemented in the real world, it becomes relevant to monitor results, e.g., by periodically taking snapshots of actual performance. It is then important to import actual Value metrics into the Plan, to compare “actuals” with planned Value metrics. This is also supported by Dashboards, and this will be demonstrated below.

Create Scenario by import

The main purpose of creating Scenarios by import is to import “actuals”. But the import facility is broader than that. It is also possible, therefore, to create a Scenario, by import, that has the same quality as a Scenario that is created manually (and as demonstrated in **Create Scenario**).

For convenience we consider two kinds of Scenarios therefore: “actuals” and “planned” Scenarios. The Scenario that was manually created, as demonstrated in **Create Scenario**, would count as “planned” Scenario from this respect.

Functionality in VMP for “actuals” Scenarios is different from functionality for “planned” Scenarios. Differences are listed in the following table:

Aspect	“actuals” Scenario	“planned” Scenario
Scenario can be created manually (see Create Scenario)	No	Yes
Scenario can be created by import	Yes	Yes
Scenario is associated with a Time Stamp	Yes	No
Input Value Measurements can be edited via “ Edit Scenario ”	No	Yes

Drill-down is supported via “ Aggregation View ” (see Navigate Value dependencies from Table)	No	Yes
Scenario can be “applied” (see Apply Scenario)	No	Yes
Calculated Values are calculated on import (where possible)	No	Yes

Note:

- When importing via a csv file, and no correctly specified row is included for a certain Value, the Measurement of that Value will be compensated for by copying it from the “applied” Scenario (see **Apply Scenario**).
- When importing for a “planned” Scenario, calculated Values are calculated on import, even when their rows are included in the csv file. This also implies: importing calculated Values, for a “planned” Scenario, is actually redundant, when their influencing Values (either input or calculated) are also imported.

Four possible modes of importing Value metrics are supported:

- Create new “actuals” Scenario
- Update existing “actuals” Scenario
- Create new “planned” Scenario
- Update existing “planned” Scenario

These four modes are driven by a combination of three conditions:

- Whether the to be imported Value metrics are considered “actuals” or not
As will appear below, this is determined by the user, by checking a checkbox “Actual Scenario” on the “**Import Options**” form.
- Whether a “Time Stamp” is provided for import or not. Above we exported Value metrics (see **Export Values**). The resulting csv file can be used as basis to create a csv file to import “actuals”. We did already encounter the column “Time Stamp” in it. Time Stamps entered should be compliant with the pattern “MM/DD/YYYY,HH:mm:ss”, which is included in the header of the Time Stamp column in the csv file for convenience.
- Whether the Scenario name, in the import csv file, is different from the name of existing Scenarios, or whether it matches an existing one

The effect of these conditions on import of Value metrics is listed in the following table:

Actual Scenario	Time Stamp in csv	Scenario name in csv	Effect
Yes	Yes, same as existing	Same as existing	Update “actuals” Scenario
Yes	Empty	Different	Create “actuals” Scenario
No	Empty	Same as existing	Update “planned” Scenario
No	Empty	Different	Create “planned” Scenario

In any other situation, import is blocked, whereby the user is informed by an appropriate message.

In the remainder of this chapter we will only demonstrate the creation of an “actuals” Scenario by import.

For this purpose, we copy and rename the csv file as created earlier.



Inside the csv file, we manipulate the data as follows:

- Rename the Scenario, as we do not intend to update an existing Scenario by import, but to create a new one, to compare with existing ones.
- Update Measurement values, to have Value metrics reflecting “actuals”

The resulting content of the csv file is as follows (with some of these modifications highlighted, and showing just the rows for the second Phase for convenience):

ValueName	Phase>Alternative	Scenario	Time Stamp	Value	Unit	Value Type
Paperboy>Paperboy Plan Criterion Set>Hourly income>Hourly income Value MeasurementMC	Better service>Base Alternative	Snapshot1		5.0602	\$/ hour	Calculated
Paperboy>Paperboy Plan Criterion Set>Revenue at risk>Revenue at risk Value MeasurementMC	Better service>Base Alternative	Snapshot1		0	\$/ year	Calculated
Paperboy>Paperboy Plan Criterion Set>Profit>Profit Value MeasurementMC	Better service>Base Alternative	Snapshot1		1003.75	\$/ year	Calculated
Newspaper round Package>Newspaper network>Publisher>Paper round>Bundle size>Bundle size Value MeasurementMC	Better service>Base Alternative	Snapshot1		1.25	newspaper / add	Input
Newspaper round Package>Newspaper network>Publisher>Paper round>Fee>Fee Value MeasurementMC	Better service>Base Alternative	Snapshot1		0.02	\$/ newspaper	Input
Newspaper round Package>Newspaper network>Publisher>Paper round>Frequency>Frequency Value MeasurementMC	Better service>Base Alternative	Snapshot1		300	rounds / year	Input
Newspaper round Package>Newspaper network>Publisher>Paper round>Supply promptness>Supply promptness Value MeasurementMC	Better service>Base Alternative	Snapshot1		96	%	Input
Newspaper round Package>Newspaper network>Publisher>Paper round>Volume>Volume Value MeasurementMC	Better service>Base Alternative	Snapshot1		150	addresses	Input
Newspaper round Package>Newspaper network>Subscriber>Tip>Tip amount>Tip amount Value MeasurementMC	Better service>Base Alternative	Snapshot1		3	\$/ address year	Input
Newspaper round Package>Newspaper network>Subscriber>Revenue proposition>Fee revenue>Fee revenue Value MeasurementMC	Better service>Base Alternative	Snapshot1		1125	\$/ year	Calculated
Newspaper round Package>Newspaper network>Subscriber>Revenue proposition>Tip revenue>Tip revenue Value MeasurementMC	Better service>Base Alternative	Snapshot1		450	\$/ year	Calculated
Newspaper round Package>Newspaper network>Subscriber>Revenue proposition>Total revenue>Total revenue Value MeasurementMC	Better service>Base Alternative	Snapshot1		1575	\$/ year	Calculated
Newspaper round Package>Newspaper network>Schedule round>Schedule round port>Coordination effort>Coordination effort Value MeasurementMC	Better service>Base Alternative	Snapshot1		1	hour / month	Input
Newspaper round Package>Newspaper network>Schedule round>Schedule round port>Execution effort>Execution effort Value MeasurementMC	Better service>Base Alternative	Snapshot1		1	hour / round	Input
Newspaper round Package>Newspaper network>Execute round>Execute round port>Extra bike cost>Extra bike cost Value MeasurementMC	Better service>Base Alternative	Snapshot1		200	\$/ year	Input
Newspaper round Package>Newspaper network>Execute round>Execute round port>Total cost>Total cost Value MeasurementMC	Better service>Base Alternative	Snapshot1		521.25	\$/ year	Calculated
Newspaper round Package>Newspaper network>Paperboy>Cost proposition>Total execution effort>Total execution effort Value MeasurementMC	Better service>Base Alternative	Snapshot1		299.25	hours / year	Calculated
Newspaper round Package>Newspaper network>Paperboy>Cost proposition>Total effort>Total effort Value MeasurementMC	Better service>Base Alternative	Snapshot1		311.25	hours / year	Calculated
Newspaper round Package>Newspaper network>Paperboy>Newspaper on the mat>Promptness>Promptness Value MeasurementMC	Better service>Base Alternative	Snapshot1		95.76	%	Calculated
Newspaper round Package>Newspaper network>Paperboy>Newspaper on the mat>Receiver satisfaction>Receiver satisfaction Value MeasurementMC	Better service>Base Alternative	Snapshot1		100	%	Calculated
Newspaper round Package>Newspaper network>Paperboy>Risk proposition>Risk of loss of paper round>Risk of loss of paper round Value MeasurementMC	Better service>Base Alternative	Snapshot1		0	%	Calculated
Newspaper round Package>Newspaper network>Schedule round>Schedule round port>Paperboy availability>Paperboy availability Value MeasurementMC	Better service>Base Alternative	Snapshot1		75	%	Input
Newspaper round Package>Backup network>Proxy>Delivery work>Compensation>Compensation Value MeasurementMC	Better service>Base Alternative	Snapshot1		5	\$/ round	Input
Newspaper round Package>Backup network>Stand-in>Backup>Availability>Availability Value MeasurementMC	Better service>Base Alternative	Snapshot1		99	%	Input
Newspaper round Package>Newspaper network>Execute round>Execute round port>Net backup availability>Net backup availability Value MeasurementMC	Better service>Base Alternative	Snapshot1		24.75	%	Calculated
Newspaper round Package>Newspaper network>Schedule round>Schedule round port>Net availability>Net availability Value MeasurementMC	Better service>Base Alternative	Snapshot1		99.75	%	Calculated
Newspaper round Package>Newspaper network>Paperboy>Cost proposition>Backup cost>Backup cost Value MeasurementMC	Better service>Base Alternative	Snapshot1		371.25	\$/ year	Calculated

To actually import this data, consider the “Details” tab of the “Dashboard editor” again:

Presentations
Scenarios
Details
Collaboration
Guidance

Name
Newspaper round transformation impact

Description
Newspaper round transformation impact

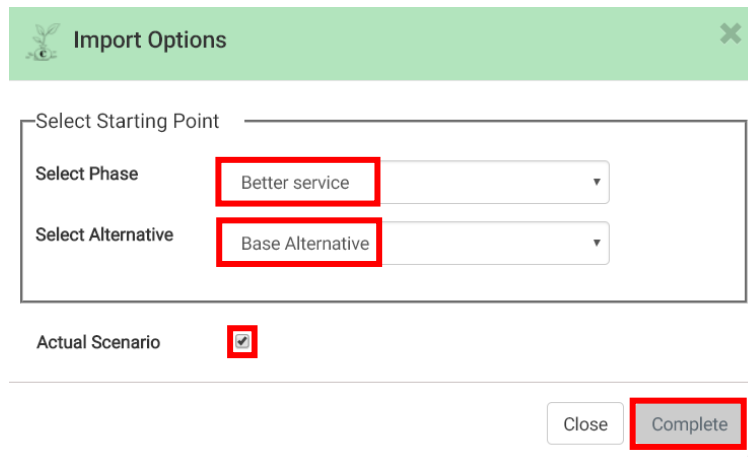
Show 5 entries
Search:
Add Another +

Input Values	Source	Source Type	Delete
Compensation	Delivery work	Value Proposition	

Showing 1 to 1 of 1 entries
Previous
1
Next

Delete
Import CSV
Export Data
Complete

Clicking button “Import CSV” will start “**Import Options**”:



Import Options

Select Starting Point

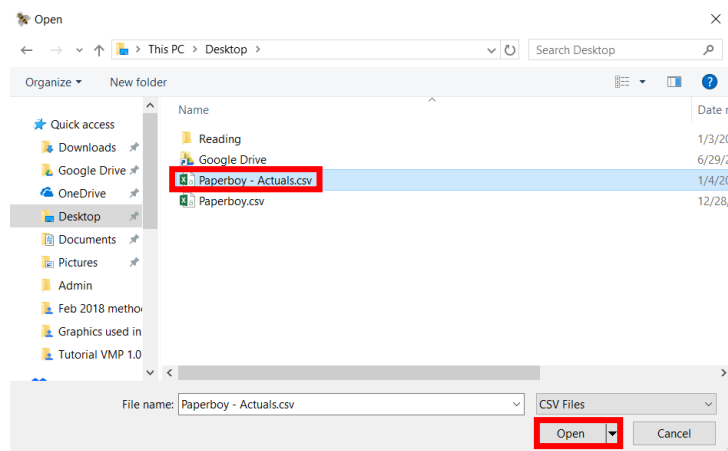
Select Phase: Better service

Select Alternative: Base Alternative

Actual Scenario: ☒

Close Complete

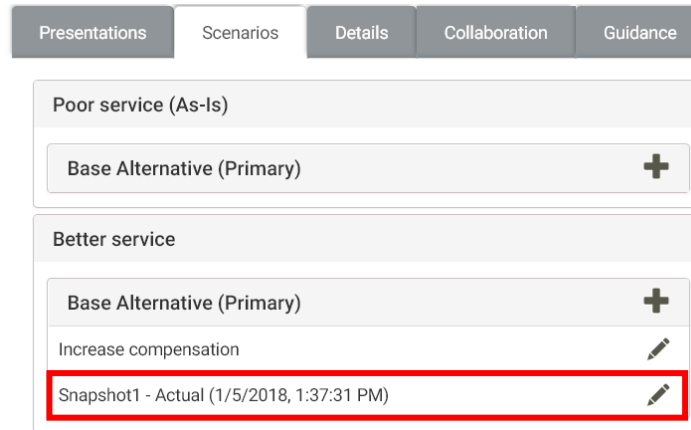
On this form we select “Better service” as Phase, and “Base Alternative” as Alternative for that Phase, to be consistent, for convenience, with the starting point that we assumed earlier (see **Create Scenario**). As it is intended to import “actuals”, “Actual Scenario” is checked (see the discussion above). Clicking “Complete” will start the file selector of the operating system, as follows:



After selecting the csv file, clicking “Open” will actually trigger the import process.

During this process, the quality of the import csv content is verified with respect to format and data completeness and correctness, and any discrepancy that is detected will be prompted to the user, so that the user would be guided to fix these discrepancies and perform the import process again.

As a result of the import process, an additional Scenario, named “Snapshot1” (conform the name as provided via the csv that has been imported), has now been created, which is listed on the “**Scenarios**” tab of the “**Dashboard editor**” page:



Note the time stamp that is associated with this Scenario. It indicates that it is a Scenario for “actuals”. The Time Stamp indicates the date & time on which the snapshot was imported. It is stored based on UTC, and rendered in the UI based on the time zone of the user.

Compare Actuals versus Plan

Importing “actuals” is mainly supported to compare plan versus “actuals”, though it is also possible and useful to compare various snapshots (Scenarios for “actuals”) with each other.

Scenarios for “actuals” can be included in Presentations, similar to how any Scenario is included, and as has been demonstrated earlier in this User Guide.

The next picture shows the comparison in a Table:

Actuals versus plan (Table)

Search:

Values	Poor service		Better service	
	Base Alternative / Base Scenario	Base Alternative / Snapshot1	Base Alternative / Base Scenario	Base Alternative / Snapshot1
Risk indicators				
Revenue at risk (€ / year)	1417.50	1417.50	0.00	0.00
Uncategorized				
Hourly income (€ / hour)	6.65	6.65	5.06 😊	5.06 😊
Profit (€ / year)	1425.00	1475.00	1053.75	1003.75

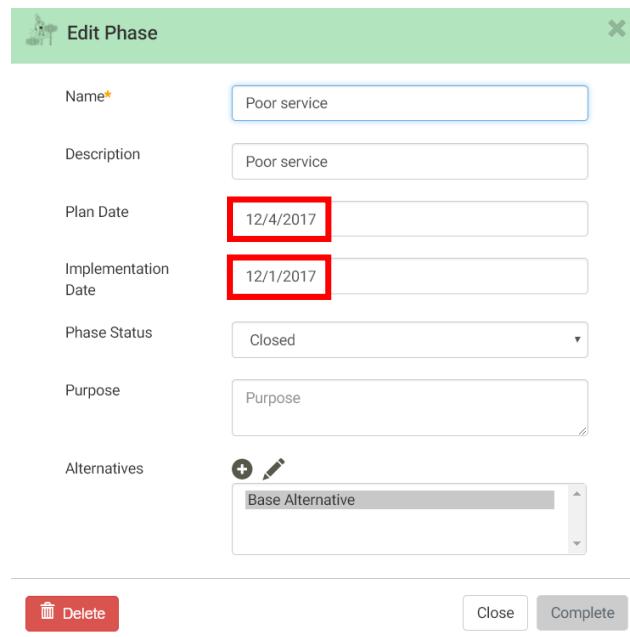
Showing 1 to 3 of 3 entries

Previous 1 Next

From this Table it can be observed that the actual Measurement for “Profit” is higher than planned, in the first Phase, while it is lower than planned in the second Phase. The user could then decide to select more Values in the Presentation, and by doing so, (s)he would then observe that “Extra bike cost” would actually be lower than planned in the first Phase, but higher than planned in the second Phase.

We demonstrated earlier how Value metrics, in Charts, can be organized by Phase / Alternative, as well as by Scenario. This applies to Scenarios for “actuals” too. Data in Bar Charts and Curves Charts can further be organized by time. This is particularly useful for comparison of “actuals” with plan, whereby the data is projected on a time line. This will be demonstrated in this section too.

This requires that dates are properly set for the Phases in the Plan. The following picture represents “**Edit Phase**”, as opened on the first Phase (“Poor service”) (see the User Guide of the [VDMbee Value Management Platform](#) for how to navigate to it and start it).



The screenshot shows the 'Edit Phase' form. The 'Plan Date' field is highlighted with a red box and contains the date '12/4/2017'. The 'Implementation Date' field is also highlighted with a red box and contains the date '12/1/2017'. The 'Phase Status' dropdown menu is set to 'Closed'. The 'Alternatives' list contains 'Base Alternative'. At the bottom, there are 'Delete', 'Close', and 'Complete' buttons.

This Phase is assumed to be implemented already, and hence its “Implementation Date” has been specified.

As the next picture suggests, the second Phase (“Better service”) has not been implemented yet, and therefore only its “Plan Date” is specified, but not its “Implementation Date”.

Edit Phase

Name*

Description

Plan Date

Implementation Date

Phase Status

Purpose

Alternatives

+

Delete

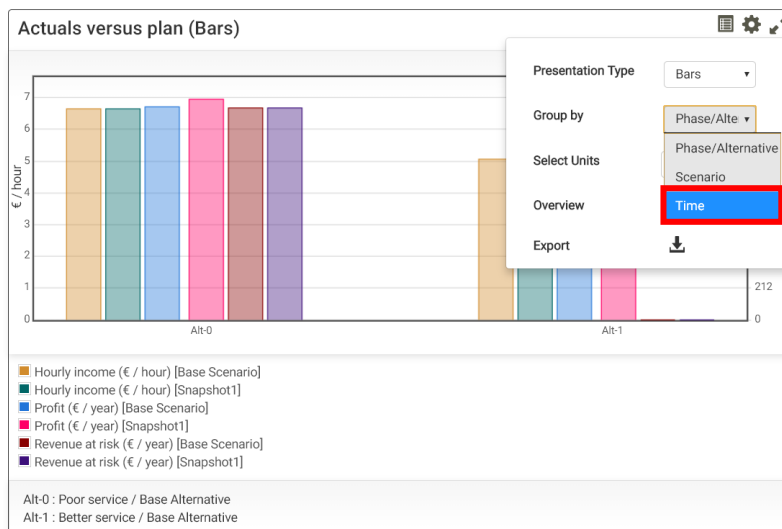
Close

Complete

“Plan Date” indicates when the Plan, according to the Phase, is expected to be implemented, whereas “Implementation Date” specifies when the Phase has been implemented (in the past).

These dates are taken into account for the purpose of building Charts, as projected on a time line, as follows: When both dates are filled, “Implementation Date” is taken as reference for the Phase, otherwise “Plan Date” is taken as reference.

It will now be demonstrated how a Bar Chart, with time line, can be created. The following picture shows a Bar Chart, with the same data scope as the last demonstrated Table. It was simply created by copying the last demonstrated Table Presentation and changing its Presentation Type from “Table” to “Bars”, in ways as demonstrated earlier in this User Guide.



When selecting “Time” as “Group by” option, via the menu behind the “wheel”, that menu will expand as follows:

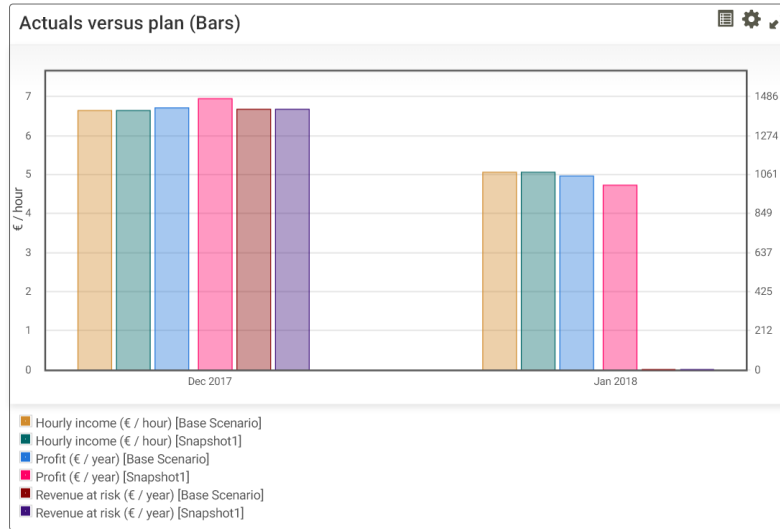
The screenshot shows a configuration panel for a chart. It includes the following controls:

- Presentation Type:** A dropdown menu set to "Bars".
- Group by:** A dropdown menu set to "Time".
- Minimum:** A date input field with the value "12/1/2017". This field is circled in red and labeled with a red "1".
- Maximum:** A date input field with the value "1/10/2018". This field is circled in red and labeled with a red "2".
- Interval:** A group of radio buttons for "Year", "Quarter", "Month", "Week", and "Day". The "Month" option is selected. This group is circled in red and labeled with a red "3".
- Select Units:** A dropdown menu set to "All selected (2)". This dropdown is circled in red and labeled with a red "4".
- Overview:** A checkbox that is currently unchecked.
- Export:** A button with a download icon.

Explanation of form controls

Control 1	Input field to edit the minimum time point for the time line in the Chart. By default it is filled with “Implementation Date” (or “Plan Date” when “Implementation Date” is empty) of the earliest Phase in the data scope of the Presentation. Editing is supported by a calendar control.
Control 2	Input field to edit the maximum time point for the time line in the Chart. By default it is filled with “Implementation Date” (or “Plan Date” when “Implementation Date” is empty) of the latest Phase in the data scope of the Presentation. Editing is supported by a calendar control.
Control 3	Radio button to specify the granularity (i.e., time interval size) of the time line (i.e., time-based x-axis). The system proposes a default interval size, based on the data in scope of the Chart.
Control 4	Drop-down selection list to (de)select Units. This Control is only applicable to Bar Charts and Curves Charts, as these Charts have as limitation that maximally two Unit scales (related to y-axes) can be handled. If the number of Units that is implied by the Value selection for the Presentation is greater than two, two Units will be auto-selected. The user can deselect them and select other Units instead, as long as the number is not greater than two. (Note that this Control is not specific to Bar Charts and Curves Charts with time line, but it applies to any Bar Chart and Curves Chart.)

The resulting Bar Chart, with time line, looks as follows:



As always, exact Measurement values can be read from mouse-tips, obtained via mouse-over of bars.

Zooming into the Chart is supported here also, in the same way as already explained in **Create Chart**.

Curves Charts with time line are supported too. This works in similar ways, with only this difference that the time line in Curves Charts is based on continuous time, as opposed to time intervals. Hence, the menu behind the “wheel”, for Curves Charts, when “Group by” is set to “Time”, will be shorter than for Bar Charts. We will not further demonstrate the use of Curves Charts with time line in this User Guide.

Life Cycle Management of Dashboards

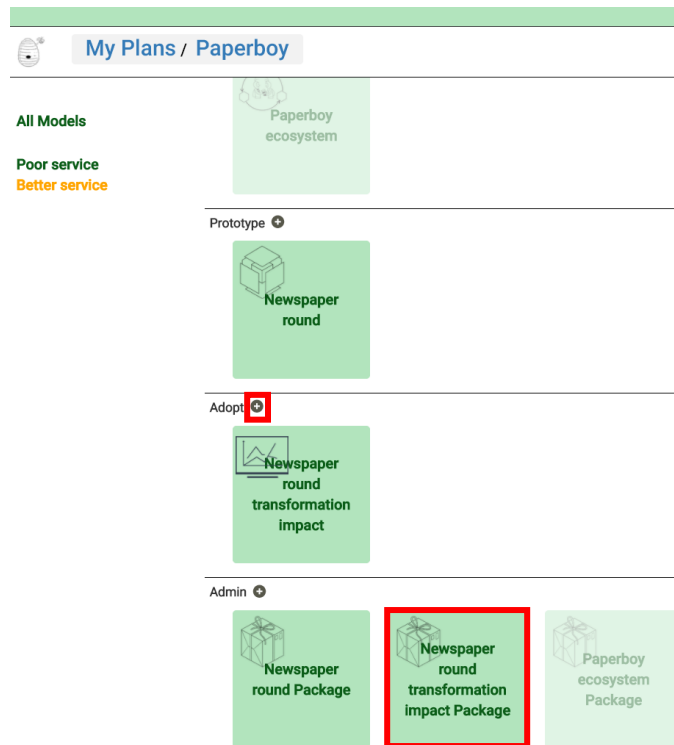
In a next Phase of the Plan, or other Alternative within a Phase, a Dashboard may change, or Dashboards may be added or removed. Changes may concern, among others:

- Adding a Dashboard to the same Package (see **Create a Dashboard**)
- Removing a Dashboard
- Renaming a Presentation in a Dashboard
- Adding or removing a Presentation to/from a Dashboard
- Adding or removing a Value, and/or a Phase / Alternative, and/or a Scenario, to/from a Presentation
- Editing (including emptying) Labels on a Value, and/or on an Alternative / Scenario, in a Presentation

When such changes occur, a local version (or “copy”) of the Dashboard is automatically created for that Phase and Alternative. Actually a local version (or “copy”) is created for the Package that contains the Dashboard (and probably other Dashboards).

This will now be demonstrated by the example of removing a Dashboard. In order to also demonstrate Dashboard Packaging, we will first create an additional Dashboard, in the existing Package, in the second Phase (“Better service”) itself. After that, a third Phase will be created, and it will then be demonstrated how removal of a Dashboard in the next Phase (i.e., in the third Phase) will lead to creation of a local version (or “copy”) in that Phase.

We first start the “**Plan page**” again in the second Phase (see **Create a Dashboard**, for how to do that). It is (partly) shown in the next picture. The **green** Model box that represents the Package to which we want to add the additional Dashboard, is highlighted in the picture.

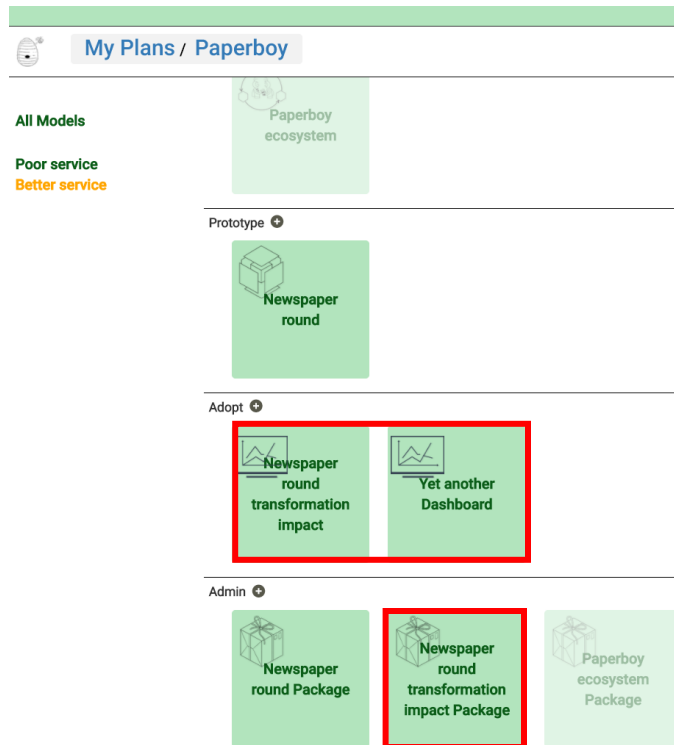


In order to create, an additional Dashboard in the same Package, we click the (+) button in the “Adopt” region of the “**Plan page**”. This starts “**Create Model**”, as before (see **Create a Dashboard**).

The 'Create Model' form has the following fields: 'Name*' (filled with 'Yet another Dashboard'), 'Description' (filled with 'Yet another Dashboard'), 'Select Type' (set to 'Dashboard'), and 'Select Package' (open dropdown showing 'Newspaper round transformation impact Pack:' as the selected option, with 'Newspaper round transformation impact Package' and 'New' as other options). The 'Newspaper round transformation impact Package' option is highlighted with a blue background and a red border. At the bottom right are 'Close' and 'Complete' buttons.

This time, as we want to add the newly created Dashboard to the existing Package, we accept the default “Select Package” option. Note that selecting the “New” option would lead to the creation of an additional Package, just containing the newly created Dashboard.

The next instance of the “**Plan page**” shows that two Dashboards do now exist in this Phase.



Note that the **green** Model boxes, that represent the existing Dashboards, as well as its containing Package, in this Phase, show “clear”, which means: they are owned by this second Phase (actually by the Alternative within the Phase).

Clicking the **green** Model box that represents the Package (“Newspaper round transformation impact Package”) starts “Edit Package”. It shows the two Dashboards as contained in this Package.

Edit Package (4)

Name (1) Newspaper round transformation impact Package

Description (2) Newspaper round transformation impact Package

Dashboards (3)

Name	Description
Newspaper round transformation impact	Newspaper round transformation impact
Yet another Dashboard	Yet another Dashboard

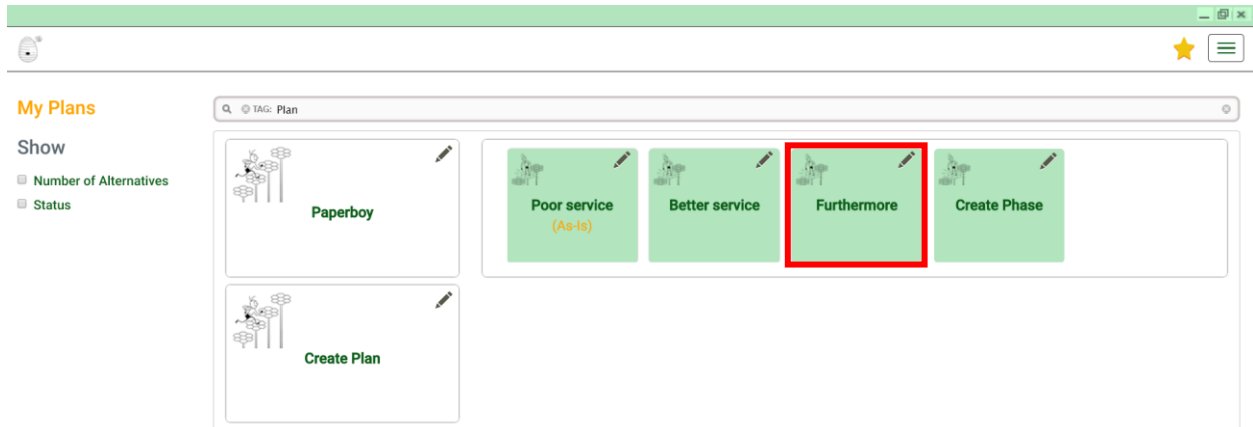
(5) Delete (6) Close (7) Complete

Explanation of form controls

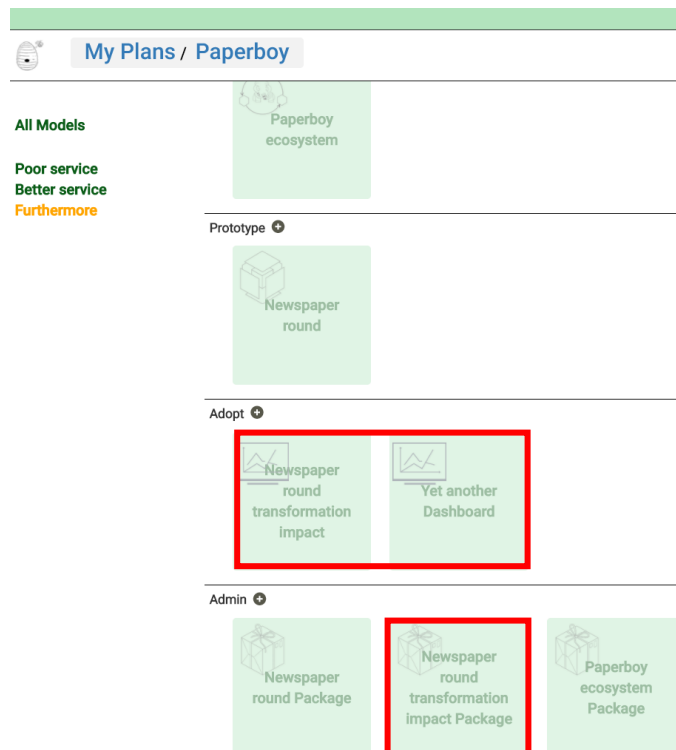
Control 1	Input field to edit the name of the Package
Control 2	Input field to edit the description of the Package
Control 3	Table to display the Dashboards that are contained in the Package

Control 4	Button to start the Object Explorer, to explore Model data as generated in the background, as far as contained in the Package
Control 5	Button to delete the Package
Control 6	Button to leave the form without saving data changes
Control 7	Button to leave the form whereby data changes are saved

We now create a third Phase in the Plan (see the User Guide of the [VDMbee Value Management Platform](#) for how to create a next Phase). The result of this is shown in the next instance of the “My Plans” page:

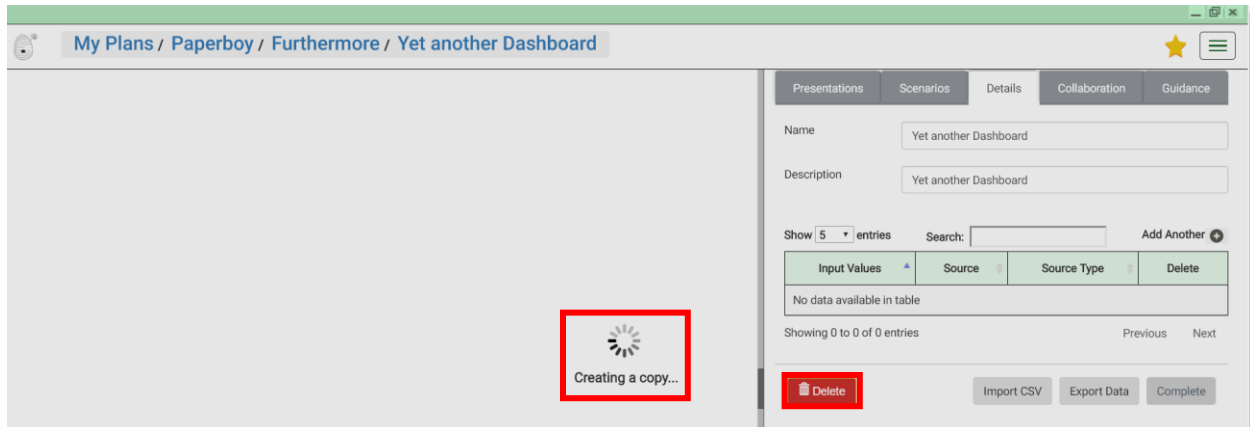


Clicking the **green** Phase box that represents the newly created third Phase (“Furthermore”), starts the “Plan page” in that Phase.



Note that the **green** Model boxes that represent the Dashboards, as well as the Package that contains them, show “dimmed”. This means: They are the same as created in the second Phase. They are just viewed in the context of the third Phase.

By clicking the **green** Model box that represents “Yet another Dashboard”, the “**Dashboard editor**” is started on it. The Dashboard is removed from Phase “Furthermore” by clicking button “Delete” on the “**Details**” tab (see also **Change Dashboard name and Delete Dashboard**). This will also trigger the creation of a local version (or “copy”) of the Package that contains the remaining Dashboard. This is indicated by the spinner, with related caption “Creating a copy...”, in the screenshot below.



As a result of this, the “**Plan page**” in Phase “Furthermore” now shows clear **green** boxes (no longer dimmed) for both the remaining Dashboard and its containing Package.

