

What if Analysis

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Overview

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'What if analysis' is a method of creating calculated fields which allow you to test scenarios. For example if you wish to create a budget formula but you are unsure of the revenue for the following period you could use calculations with a number of input parameters to define the budget value.

Planning Your What if

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Firstly you will have to define the columns that you wish to have as the output to your scenario. You will need to understand the major calculations you wish to apply including the input variables and their potential inputs.

For example if you wish to conduct a 'What if' on Sales Revenue you may create a calculation based on the following parameters:

Lasts Years Sales Units * Price * **< Price Change>** * **< Change of Sales Volume>**

Where the < Field > represents user parameters that you want the user to input.

Building your Formulas

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To build a 'What if Analysis' formula you must have 'Parameters' defined on your view. A parameter is a special type of input field that is used to capture a value from the user and to use that value for calculations and filters.

The calculations for your What If are built using the Add Calculated Field method described above. However, you will need to make sure that you use parameter fields in your calculation.

If you wish to apply % changes to your calculations then ensure you assume the user will input values where 100% = 100 and not 1. This is because some of the input options work in whole number increments and not decimals.

Note: you can only use a single parameter for a single input. For example a parameter field that is to be used for % Price Change cannot be used to also Capture % Change in Sales Volume unless you wish both values to be identical.

Defining User Prompt Formatting

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Once your formulas have been defined you can drag these onto the report. You will note that any parameters included in those calculations will now appear in the filters section of your report data. This is because the parameter is treated somewhat like a user prompt filter.

On the report preview page you will be able to format your parameters to create dials and sliders for numeric fields.

Click on the Filters tab at the top of the page and select the parameter you wish you format. From here you will be able to edit the parameter options such as name and format etc.

Entry style

Format

Actions

Entry style:

☐ Field
☒ Dial
☐ Slider

Colour:

☐ Black
☒ Blue
☐ Grey

Min:

0

Max:

200

Default:

100

Close

Option	Description
Description	Give the parameter a usable name – this will be displayed on the user prompt.
Default Value	The default value used to ensure that the parameter can work even if the user does not immediately enter a value. Enter an appropriate value for your parameter.
Display Type	Choose how you want the user prompt to be displayed. You can use with a text box, Dial or slider.
Colour	If using a slider or dial choose the colour of the Slider or Dial
Min	If using a slider or dial choose the minimum allowable value.
Max	If using a slider or dial choose the maximum allowable value

Running your What if Scenario

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Once all your calculations and parameters have been defined continue to the report output page. Here you will see the parameters being presented. If you change the parameters from the default values using the input mechanisms presented you will see the data in your report updated in your calculated field columns with new values.

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