



# Your PDF Guides

You can read the recommendations in the user guide, the technical guide or the installation guide for BUSINESS OBJECTS XCELSIUS 2008. You'll find the answers to all your questions on the BUSINESS OBJECTS XCELSIUS 2008 in the user manual (information, specifications, safety advice, size, accessories, etc.). Detailed instructions for use are in the User's Guide.

**User manual BUSINESS OBJECTS XCELSIUS 2008**  
**User guide BUSINESS OBJECTS XCELSIUS 2008**  
**Operating instructions BUSINESS OBJECTS XCELSIUS 2008**  
**Instructions for use BUSINESS OBJECTS XCELSIUS 2008**  
**Instruction manual BUSINESS OBJECTS XCELSIUS 2008**

Xcelsius 2008 User Guide

Xcelsius 2008 User Guide



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It also features the most commonly used visualization export options. Xcelsius Engage has all of the features of Xcelsius Present. It offers additional components as well as additional visualization export options. It is intended for users who need to connect to an external data source. Xcelsius Engage Server provides all of the features of Xcelsius Engage.

In addition, it offers integration capabilities with web portals and Reporting Services. Xcelsius Engage Server is bundled with Flynet Web Services Generator. It is intended for users who wish to create visualizations that are deployed in a portal environment. BusinessObjects Xcelsius Enterprise provides all of the features of Xcelsius Engage. In addition, it offers integration capabilities with web portals and Reporting Services.

BusinessObjects Xcelsius Enterprise integrates with the BusinessObjects platform, including Query as a Web Service (QaaWS), LiveOffice, and Crystal Reports. It is intended for users who wish to create visualizations that are deployed in a BusinessObjects Enterprise environment. 18 Xcelsius 2008 User Guide Application Overview 2 2 Application Overview What is Xcelsius 2008? Xcelsius 2008 is a leading-edge Microsoft Windows application that brings data to life! Using breakthrough technology, Xcelsius 2008 bridges the gap between data analysis and visual presentation, empowering users of all proficiencies to create visually stunning interactive reports and applications. With Xcelsius 2008, users can communicate data in a clear and powerful style that's appealing to the mind and to the eye. Xcelsius 2008 is intuitive enough for beginners and versatile enough for advanced users. Most importantly, it makes the process of generating reports and applications fun, without requiring users to learn arcane programming languages. With Xcelsius 2008, simply pointing and clicking your mouse can create rich interactive presentations. Your only limitation is your imagination. Xcelsius 2008 offers tight integration with Microsoft Corporation's ubiquitous Office products. This tight integration lets you attach your reports to Microsoft Outlook e-mail messages or embed them into PowerPoint slides using just a single mouse click! The Technologies That Drive Xcelsius 2008 Xcelsius 2008 combines two of the most widely used software applications in the world: · Microsoft Excel · Adobe Flash Player Microsoft Excel is one of the most popular software programs today.

It is a member of the Microsoft Office family of products and is used daily by millions of people around the world to create reports. Adobe Flash Player is widely used to view applications developed in Adobe Flash. According to Adobe, there are roughly 516 million computers with the Flash Player (as of March 2003). With these figures, it is almost a certainty that your personal computers at home and at the office already have Microsoft Excel and Adobe Flash Player installed. The synergy derived by integrating these two widely deployed applications allows Xcelsius 2008 to leverage years of sophisticated 20 Xcelsius 2008 User Guide Application Overview 2 programming and proven IT and business technologies.



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The result is a winning combination that raises the standard in terms of power and usability. What Skills Does a User Need? Xcelsius 2008 is uniquely designed to be easy and enjoyable to use. Since its underlying technology is Microsoft Excel, the only skills a user needs to create striking visual effects in their reports is a basic understanding of how Excel works. No additional training is required! Xcelsius 2008 User Guide 21 2 Application Overview 22 Xcelsius 2008 User Guide What's New in Xcelsius 2008 3 3 What's New in Xcelsius 2008 Importing a Crystal Xcelsius 4.5 file into Xcelsius 2008 Embedded Spreadsheet Xcelsius 2008 now provides an embedded spreadsheet which is a fully functional Excel workbook incorporated into Xcelsius 2008. The Embedded spreadsheet allows you to create, edit, and manipulate model data directly in your Xcelsius 2008 file, without the need to import or re-import Excel spreadsheets. New Components Xcelsius 2008 now provides the following new components:

- **Tree Maps** Tree Maps are visualizations that display hierarchical data in a small area. In Xcelsius 2008, Tree Maps have two parameters: size and color intensity.
- **Reset Button** The Reset Button allows the end user to revert to the visualization's original settings after changing data at runtime.
- **New Maps** Additional maps have been added that cover Europe and Asia Pacific countries.
- **Print Button** The Print Button allows a user to print the SWF file directly from the browser.

24 Xcelsius 2008 User Guide What's New in Xcelsius 2008 Importing a Crystal Xcelsius 4.5 file into Xcelsius 2008 3 Xcelsius Engage new components In addition to the components available in Xcelsius 2008, Xcelsius Engage provides the following components in all versions:

- **Panel Container** A Panel Container acts as a smaller canvas within the main canvas and holds one or more components. Components in the Panel Container can be moved, added, changed, or deleted.
- **Panels** can be placed anywhere on the canvas.
- **Tab Set** Tab Set is similar to Panel Containers. The Tab Set acts as a smaller canvas within the main canvas. A Tab Set contains multiple tab views; each can be displayed on the canvas by clicking its corresponding tab.
- **Trend Analyzer** The Trend Analyzer combines data analysis and visualization. The component analyzes the data selection and provides an additional data series that can be plotted to display a trend line.
- **History** Xcelsius 2008 User Guide 25 3 What's New in Xcelsius 2008 Importing a Crystal Xcelsius 4.5 file into Xcelsius 2008 The History component tracks and displays the history of changes in a selected cell. This allows you to easily see the effect of changes in worksheet data.
- **Connection Refresh Button** The Connection Refresh Button is linked to one or more data connections that retrieve data from an external source.

Adding the Connection Refresh Button to your visualization allows users to refresh the data on demand.

- **Reporting Services Button** The Reporting Services Button component enables you to connect to the Xcelsius Reporting Services (XRS) server and select the report that will be used to populate the visualization. The XRS server is a web service that allows Xcelsius to communicate with your SQL Server Reporting Services (SSRS) server. Use of XRS requires an installation on your web server. Please refer to the XRS documentation included on the CD for more information.
- **Source Data** The Source Data component indexes the selected source data range. This component does not have a visual display; it works within the visualization in combination with other components. New Features Xcelsius 2008 now provides the following new features:
- **Alerts for selectors** 26 Xcelsius 2008 User Guide What's New in Xcelsius 2008 Importing a Crystal Xcelsius 4.5 file into Xcelsius 2008 3 Alerts can now be added to the following selector components: Label Based Menu, Combo Box, List Box, List Builder, and Ticker.
- **Insert Filtered Rows** A selector component can be bound to a Source Data range of multiple rows with duplicate labels; when a label is selected, the component will filter the range to insert only the rows corresponding to that label.
- **Dynamic Selected Item** In list-based selectors, the labels can be changed dynamically through another component in the model.
- **Trigger Key** Trigger keys are bound to variable cells and are set to fire when the cell value matches a target value. Trigger keys are used to trigger data connections and are also available in the URL Button and Connection Refresh Button.
- **Dual Axis Charts** Xcelsius 2008 now has the ability to plot series data on both a primary and a secondary axis. This is available for the following charts: Line, Bar, Stacked Bar, Column, Stacked Column, Area, Stacked Area, and Combination Chart.
- **Add-on Manager** This feature allows you to install or remove add-ons from within the Xcelsius application.
- **Export to Acrobat 9** Visualizations can now be exported to Acrobat 9.
- **Export to Adobe AIR** Visualizations can now be exported to Adobe AIR. New Functions Xcelsius 2008 now provides the following new functions:
- **Copy/paste components across XLF files** Xcelsius 2008 User Guide 27 3 What's New in Xcelsius 2008 Importing a Crystal Xcelsius 4.5 file into Xcelsius 2008 Once you have set up a component in an XLF, you can reuse the component by copying and pasting it into other XLFs. The component will attempt to retain the same binding references and appearance.
- **Printing Visualizations** can now be printed during Preview mode or from the exported SWF.

New Functions in Xcelsius Engage versions: In addition to the functions in Xcelsius 2008, Xcelsius Engage provides the following functions:

- **Data Manager** External connections are now managed in a central location. The Data Manager is used to configure and manage all external data connections.
- **LiveCycle Data Services connections** LiveCycle Data Services provides up-to-second views of your business data via dashboards connected to Adobe LiveCycle Data Services, streaming real-time data into interactive visualizations.
- **External Interface Connection** Data from the SWF file can now be passed into or out of a specific cell range, using push/pull technology.
- **Crystal Reports integration** Xcelsius 2008 visualizations that are embedded in Crystal Reports can be configured to read data from the hosting Crystal Report and dynamically update when the Crystal Report data changes. Appearance
- **Components Browser** 28 Xcelsius 2008 User Guide What's New in Xcelsius 2008 Importing a Crystal Xcelsius 4.5 file into Xcelsius 2008 3 The Components Browser look and feel has been significantly changed from previous versions.



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· Interface The Components Browser displays the components in a sliding accordion menu.

Components can be displayed in Category, Tree, or List view. · Favorites Frequently used components can be added to the Favorites category in the Category view. · Object Browser Xcelsius 2008 User Guide 29 3 What's New in Xcelsius 2008 Importing a Crystal Xcelsius 4.5 file into Xcelsius 2008 · Lock/Unlock

Components can be locked in the object browser to prevent them from being selected or changed while the visualization is being designed. · Move forward/back Components can easily be moved forward or backward in layers of the visualization by dragging the component or group towards the top or bottom of the Object Browser, or by selecting selecting a component or group and clicking the directional arrows at the bottom of the Object Browser. · Group/Ungroup Grouped components appear as subsets in the Object Browser. Components can be added to or removed from a group in the Object Browser. · Hide/Show Individual components and groups can be hidden or shown by clicking on the dot or checkmark located in the column under the Hide icon. All components on the canvas can be hidden/shown by clicking on the Hide icon. · Docking The Components, Object, and Properties Browsers can be moved by clicking on a browser's title bar and dragging it to dockable areas on the canvas.

Mouse over an arrow (displayed while a browser is being dragged) and Xcelsius 2008 will highlight the corresponding docking location. 30 Xcelsius 2008 User Guide What's New in Xcelsius 2008 Importing a Crystal Xcelsius 4.5 file into Xcelsius 2008 3 · Auto-hiding To increase screen space for the canvas, the Components, Objects, and Properties Browsers can be minimized to the margins of the display. A display tab is shown for minimized browsers; hovering over the tab displays the browser window. The images below show the Object Browser minimized (top image) and displayed on mouse over (bottom image).

Xcelsius 2008 User Guide 31 3 What's New in Xcelsius 2008 Importing a Crystal Xcelsius 4.5 file into Xcelsius 2008 · Quick Views 32 Xcelsius 2008 User Guide What's New in Xcelsius 2008 Importing a Crystal Xcelsius 4.5 file into Xcelsius 2008 3 Xcelsius 2008 includes pre-configured workspace configurations. In addition, your customized workspace is automatically saved as My Workspace when Xcelsius 2008 closes. You can select a different workspace view from the Quick Views menu.

Importing a Crystal Xcelsius 4.5 file into Xcelsius 2008 Xcelsius supports the ability to import a visualization created with Xcelsius 4.5. This import ability lets Xcelsius 4.5 customers upgrade their existing visualizations to take advantage of the new features of Xcelsius 2008. Backup your current XLF, JPEG, and external SWF files before upgrading your visualization. Note: Xcelsius 3.0, 3.5, and 4.0 files cannot be imported into Xcelsius 2008.

To use these files in Xcelsius 2008 you must first import them into Xcelsius 4.5, then import the files into Xcelsius 2008. To import your existing visualizations, start Xcelsius 2008 and select File > Open. Select the XLF that you would like to import and click Open. Xcelsius 2008 will detect that the XLF is an older visualization and warn you that it is going to import the visualization into Xcelsius 2008, and that this may result in certain features not functioning. Note: After you import and save your visualization with Xcelsius 2008, the visualization cannot be opened using an earlier version of Xcelsius. Xcelsius 2008 minimizes the impact of migrating visualizations from Xcelsius 4.5. However, it is possible that some of your visualizations, or more specifically, some components, will look slightly different from the original file. The following are some of the most frequently encountered changes: · The size of some components is different.

In most cases the size difference is a matter of a few pixels. Xcelsius 2008 User Guide 33 3 What's New in Xcelsius 2008 Importing a Crystal Xcelsius 4.5 file into Xcelsius 2008 · · Due to art improvements, some custom colors appear to be slightly different. The Spreadsheet Table component differs in size and formatting. In the event of formatting differences in your components, bring up the Properties panel for the component and re-bind any properties that are tied to the cells in the spreadsheet.

34 Xcelsius 2008 User Guide Getting to Know Xcelsius 2008 4 4 Getting to Know Xcelsius 2008 Overview Overview This section provides an introduction to Xcelsius 2008, the components of the program, and the functionality of the program. Understanding the Xcelsius 2008 system Xcelsius 2008 visualizations conform to SWF file format. SWF is the vector-based graphics format designed to run in the Adobe Flash Player. Because a SWF file is vector-based, its graphics are scalable and play back smoothly on any screen size and across multiple platforms. Also, a vector-based file usually has a smaller file size than other animations.

Xcelsius 2008 files are stored in a zipped format with an XLF extension. The XLF file format contains the Xcelsius 2008 visualization information and its associated embedded spreadsheet file. Note: Xcelsius 2008 requires Flash version 9 or later. Newer Flash versions have security features which may prevent your Xcelsius 2008 visualization from connecting with an external data source. Without a policy file, SWF files from one domain cannot access data on another domain or sub-domain. In addition, SWF files served over HTTP cannot access data at an HTTPS location. Please refer to the online article from Adobe regarding security restrictions for data loading for information on creating a policy file to allow access to data in the cases above. How Xcelsius 2008 differs from traditional reporting applications Xcelsius 2008 complements all types of Portal initiatives, Business Intelligence programs, Executive Dashboards, Balanced Scorecard projects, Marketing Reports, and day-to-day reporting and presentation requirements. Xcelsius 2008 does this by letting end users participate in the report creation process and analysis. 36 Xcelsius 2008 User Guide Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 system 4 How Xcelsius 2008 works There are three steps to create an Xcelsius 2008 visualization: 1.

Add data to the spreadsheet. 2. Build the visualization. 3. Publish the visualization. For detailed instructions on creating visualizations, see Creating and Updating Xcelsius 2008 Visualizations on page 69. How visualizations look Visualizations created with Xcelsius can have any type of standard or personalized look. Visualizations are also fully compatible with Microsoft Power Point, HTML, and Portals. Xcelsius visualizations conform to SWF file format.



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SWF is the vector-based graphics format designed to run in the Flash Player.

Because a SWF file is vector-based, its graphics are scalable and play back smoothly on any screen size and across multiple platforms. Also, a vector-based file usually has a smaller file size than a bitmap animation. Visualizations created with Xcelsius are dynamic. What-if scenarios let users adjust conditions on the visualization and view the results. Interactive components let users alter the visualization conditions.

The following examples show visualizations created with Xcelsius. Example 1: What-if presentation using alerts This visualization shows the return-on-equity (ROE) for a financial institution against its peer group performance. The alert colors are triggered, comparing Xcelsius 2008 User Guide 37 4 Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 system the selected bank against the peer group average. Example 2: What-if presentation using a calculator The following visualization was created to calculate the monthly payment for a home loan. Users can adjust the input values by moving the sliders. The 38 Xcelsius 2008 User Guide Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 system 4 calculator dynamically changes and displays the new values. Example 3: Historical data comparison presentation The following visualization is a dynamic financial statement report. It shows the traditional Statements of Income. When a user clicks on an account, the visualization shows the historical data organized by region or as a comparison Xcelsius 2008 User Guide 39 4 Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools against competitors. Understanding the Xcelsius 2008 tools Before you begin using Xcelsius, take a moment to familiarize yourself with the interface by reading the following section. In this section you will learn about Xcelsius elements, browsers, tools, and other options. Note: To view a browser, select the browser from the View menu. In the View menu, a check mark next to the browser name indicates that the browser window is open; if you cannot see the browser in your workspace, it may be minimized at the perimeter of the Xcelsius window. Using the Components Browser The Components Browser shows the available components that can be added to your model. 40 Xcelsius 2008 User Guide Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools 4 The window contains three views: · · · Category View Tree View List View Category View The components are grouped in a sliding accordion menu according to their functionality.

You can navigate to a component in the Category view of the Components Browser by clicking on a category title or dragging the scrollbar until you reach the desired category. · Favorites Xcelsius 2008 User Guide 41 4 Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools · · · · · · · · · Charts Containers (available only in Xcelsius Engage 2008) Selectors Single-Value Maps Text Other Art & Backgrounds Web Connectivity Note: To add a component to Favorites, navigate to the component in the Category view, right-click on its icon and select Add To Favorites. To delete the component, right-click the icon in the Favorites category and select Remove From Favorites. List View In the List View, the components are organized alphabetically. To navigate in the List View, click anywhere within the window, then type the first letter of the component you wish to open, or drag the scrollbar until you reach the desired component. 42 Xcelsius 2008 User Guide Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools 4 Note: The List view does not contain the Favorites category. Favorites can only be viewed or added in Category and Tree views. Tree View In Tree View the components are organized in folders according to their category. Note: To add a component to Favorites, navigate to the component in the Tree view, right-click on its icon and select Add To Favorites. To delete the component, right-click the icon in the Favorites category and select Remove From Favorites.

Using the Canvas The canvas area is the white work area where you place components to create a visualization. The canvas color can be customized using its Properties panel. If the Properties panel is not open, double click anywhere on the canvas to open the panel. Placing components on the canvas using drag and drop 1. On the Components Browser, click a component.

2. Holding down the left mouse button, drag the component onto the canvas. 3. Release the mouse button. Xcelsius 2008 User Guide 43 4 Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools The component is dropped on the canvas at the location of the mouse pointer. 4. Repeat this procedure for each component. Placing components on the canvas using point and click 1. On the Components Browser click a component. 2. Click the canvas area. The component is dropped on the canvas at the location of the mouse pointer. 3. Repeat this procedure for each component. Fitting the canvas to components After you complete your visualization, you may want to adjust its final size to eliminate any surrounding white area.

To do this, use the Fit Canvas to Components button on the tool bar. Your visualization size will be adjusted to the minimum size according to the components placed on the canvas. In addition, you can use the Increase Canvas and Decrease Canvas buttons on the toolbar to shrink or grow the canvas in small increments. Fitting the canvas to the window To resize the canvas so that it fills the workspace, click Fit Canvas to Window on the toolbar. Changing the canvas size You can change the canvas size before you start creating a visualization by clicking Document Properties on the File menu. The Document Properties dialog box appears. 44 Xcelsius 2008 User Guide Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools 4 You can modify the preset size to some standard sizes, or you can create your own size. The ideal size of your visualization depends on the quantity of components that you plan to use. If you are building a simple visualization that contains a chart and slider, the size can be around 640x840. Use the full size screen for dashboards or one-page visualizations that contain several charts and selectors.

In the description field, you can write a brief description of your visualization, the author, the date, and its intended functionality. This information will appear to all other designers when they use your XLF file or when you save your visualization as a template. Using the Grid Tool The Grid command on the Preferences menu provides a layout tool that can aid in positioning components on the canvas. Select File > Preferences > Grid to open the Grid Tool.



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Xcelsius 2008 User Guide 45 4 Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools The following options for customizing the grid are available: . . . . Show Grid.

This option controls the visibility of the grid. Snap to Grid. This option aligns the selected components to the grid lines. Height. This option sets the vertical spacing intervals for the grid in pixels.

Width. This option sets the horizontal spacing intervals for the grid in pixels. Using the Canvas Properties Panel Type Click the drop-down menu to select a canvas type: · Solid Color · · Gradient (default) Image None Note: Canvas Appearance Type "None" creates a transparent background with used in conjunction with the "wmode" Flash Object parameter in HTML code. Background Color Click the adjacent cell selector button to customize the color of the canvas background. Note: This setting is only available if Gradient is the selected Type. 46 Xcelsius 2008 User Guide Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools 4 Background Color 1 and 2 Click the adjacent cell selector button to customize the first and second color to be used in the canvas background. Color 1 will be displayed at the top of the canvas and fades downward into Color 2. Color 2 will be displayed at the bottom of the canvas and fades upward into Color 1. Note: These settings are only available if Gradient is the selected Type. Import Button Click the Import Button to launch the Open file dialog box.

Navigate to the JPEG or SWF file to be used as the canvas background. Note: This setting is only available if Image is the selected Type. Using the Properties panel The component Properties panel contains the setting and format options for the selected component. After you place a component on the canvas area, you can access the Properties panel by double-clicking the selected component, right-clicking on the component, or selecting the component and typing ALT+ENTER. In general, the Properties panel has the same structure for all components, but the options available are specific to each individual component. The Properties panel may have the following tabs: · General Xcelsius 2008 User Guide 47 4 Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools The General tab contains the required settings for the selected component. At a minimum, it contains an area for the title or label(s), and an area to select the Data Source or enter the values that will be displayed. · Drill Down The Drill Down tab contains a series of parameters for adding drill-down capability for charts. For information on the Drill Down tab, see Drill Down tab on page 264. Note: This tab applies only to Chart components. · Behavior The Behavior tab contains settings related to the way the component will work in the visualization. Typically, it contains areas for defining the functions related to limits, interactivity, and dynamic visibility. See Dynamic Visibility functionality on page 148 for more information. · Appearance The Appearance tab contains a series of settings areas, and in some cases sub-tabs, that let you modify the appearance and formatting of components. On this tab you will find options like font size, title location, and colors.

· Alerts 48 Xcelsius 2008 User Guide Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools 4 The Alerts tab contains all the parameters available for using alerts. On this tab, you can define the number of alert colors, the colors used, and the target limits. See Alerts on page 154 for more information. Properties for multiple selections By selecting multiple components on the canvas, you can simultaneously edit Properties for the components in your selection. To access Properties for multiple components select your components and double click the selection.

You can also access the Properties by right-clicking the selection and selecting Properties from the context menu. If the components are of the same type, you will be able to edit Properties specific to that component type. For example, if your current selection contains three Line Chart components, you will be able to access the Properties specific to the Line Chart. Any change made to the Properties will apply to all components in the selection. The Properties panel selections with components of mixed types or groups are limited to the Dynamic Visibility parameters of the Behavior tab. When a number of components are grouped, the Properties for individual components within that group may be accessed by right-clicking on that sub-group component in the Object Browser window. See Using the Object Browser on page 49 for more information. Using the Object Browser In the Object Browser, you can select, hide, show, cut, copy, paste, delete, bring forward, move back, group, ungroup, lock, unlock, and access Properties panels of components. Xcelsius 2008 User Guide 49 4 Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools The Object Browser can be docked in locations around the workspace or minimized as needed. If you have closed the Object Browser, click Object Browser on the View menu to re-open it.

Using the context menu Display a context menu by right-clicking on any component in the browser or on the canvas. The context menu provides access to many of the functions that are available in the Object Browser. Selecting components To select a component in the Object Browser, click the component name or icon to make it the active component on the canvas. To select multiple components, click a component name or icon, and then hold down the CTRL key while you click additional components. To select a range of components, hold down the SHIFT key while selecting the range in the Object Browser, or click on the canvas and drag the cursor over a group of components. Combine methods by selecting a group of components first with SHIFT+click and then other separate components using CTRL+click. Always select using SHIFT+click first; this will not work in reverse. Select all components by selecting any component, then pressing CTRL+A. Note: On the canvas, you cannot select components that are marked as hidden or locked. Those components can only be selected in the Object Browser.

50 Xcelsius 2008 User Guide Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools 4 Grouping components Objects in the Object Browser can be grouped in the following ways: · · Select several components, then right-click on any of the components and select Group from the context menu. Select several components, then click n the toolbar. Once grouped, the components will appear in the browser in tree form with a folder representing the group. Expand the group folder by clicking the + button or double-clicking the folder icon or the group label.



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Components can be dragged into and out of the group by dragging them to a different location in the browser tree.

To ungroup selected components, click on the toolbar or right-click on the group to access the context menu, then select Ungroup. Hiding components To hide a component in the Object Browser, click the dot in the column under the hide icon . To hide a group, click the dot in the hide column for the group. To hide all components, click the hide icon. To show a hidden component or group, click the check mark under the hide icon.

To show all hidden components and groups, click the hide icon twice. Locking Components Components and groups can be locked on the canvas to prevent any interaction with them. This can be helpful when there are many components laid out on the canvas. The component or group will only be selectable in the Object Browser. To lock a component or group, click the dot under the lock icon . To unlock a group or component, click the check mark under the lock icon.

All Xcelsius 2008 User Guide 51 4 Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools components and groups can be locked by clicking the lock icon once, and all unlocked by clicking twice. Deleting components Delete any selected components by pressing DELETE or selecting Delete from the right-click context menu. Tip: You do not need to ungroup components to delete components that are in the group. Deleting a component can be undone pressing CTRL+Z or clicking Undo on the Edit menu.

Opening Properties panels Properties panels for components, either alone or in a group, are opened using one of the following methods: · Click the icon or label. Note: Slowly double-clicking the label will enable the Rename function instead of Properties. · Select the component and press ALT+ENTER. Right-click the component and click Properties. Properties panels for a group are opened separately from the Properties panels of individual components within the group: · Right-click the group label or icon and click Properties. Select the group and press ALT+ENTER. Note: Do not double-click a group to open its Properties panel; unlike individual components, double clicking on a group entry expands or collapses that group within the tree. Once the Properties panel is opened for one component you can navigate to the Properties panel of another component or group by clicking on the entry in the Object Browser. 52 Xcelsius 2008 User Guide Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools 4 Renaming components Each component is assigned a default browsing name when placed on the canvas. This is the name that appears in the title bar of the Properties panel and in the entry in the Object Browser.

You can override these default names to enter your own. Double-click slowly on the component name in the Object Browser to enable label edit mode. Type in a name and press ENTER or click on another component. Using the Embedded Spreadsheet The Xcelsius 2008 workspace incorporates an embedded spreadsheet. This fully functional spreadsheet is displayed below the canvas and contains the source data for your visualizations.

You can add, modify, and delete your data directly within the spreadsheet without having to import or re-import an Excel spreadsheet. There are several ways to bring data into the embedded spreadsheet: · Import a spreadsheet from Excel. See: Importing Excel spreadsheets on page 56 . Copy/paste data from an Excel or Xcelsius 2008 file. Manually enter the data into the embedded spreadsheet.

You can bind cells in your embedded spreadsheet to components on your canvas. Xcelsius 2008 User Guide 53 4 Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools Note: If you import a spreadsheet after linking to cells, the imported data will overwrite all data in the current embedded spreadsheet. The cell binding locations will remain the same, but the data may be changed. You can also copy and paste cells between Xcelsius 2008 and Excel. Excel values and formulas can be copied into Xcelsius 2008, but conditional formatting of cells will not be retained. Note: Xcelsius 2008 opens an instance of Excel that runs in the background. Although you can open a second instance of Excel, you will not be able to copy formulas between the instances. If you need to use Excel and Xcelsius 2008 files simultaneously, first open Xcelsius 2008, then open your Excel files by navigating to them using Windows Explorer and double-clicking on them. If you need to keep synced Excel and Xcelsius 2008 files, we recommend making your updates in the Xcelsius 2008 embedded spreadsheet and then exporting the data to an Excel spreadsheet. Note: Xcelsius 2008 imports Excel files by copying the spreadsheet data and inserting the data into the Xcelsius 2008 embedded spreadsheet.

After the data has been imported, it is no longer linked to the original Excel spreadsheet. Any changes you make to the source file will not appear in the Embedded Spreadsheet, nor will any changes to the Xcelsius 2008 file appear in the original Excel file. The embedded spreadsheet is a fully functioning Excel spreadsheet, complete with toolbars used in Excel. If you are using Excel 2003, you will be able to see your default toolbars. Toolbar buttons not related to working with the data have been disabled (Save, Open, Print, etc.). These disabled buttons are functions that are handled by Xcelsius. If you wish to Save the spreadsheet, use Xcelsius's File > Save function, or export the spreadsheet back to Excel. See Importing Excel spreadsheets on page 56 for more information.

If you are using Excel 2007, you will be able to see the ribbon displayed at the top of the program.

In addition to the disabled buttons, the drop down menus are disabled in the ribbon. For both versions of Excel, you can add Excel functionality to the toolbar by right-clicking on any toolbar and adding the toolbar with the desired function(s). 54 Xcelsius 2008 User Guide Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools 4 Embedded Spreadsheet Although the embedded spreadsheet is a fully functioning Excel spreadsheet, not all Excel functions are supported. Xcelsius 2008 does not support macros, conditional formatting, or all available formula functions. For a full list of supported formula functions, see Supported Excel Functions on page 387.

Xcelsius 2008 does support the moving of bound data ranges. For instance, if your chart source data range needs to be moved down a row to fit in the title, simply select the range and move it to its new location. Xcelsius 2008 will retain the new information and reference the new range. However, if only part of the range is moved the bound cell reference will remain the same. You will need to open the component's Properties panel and re-bind the cell reference to the new location if only part of the range is moved and you want the new location referenced.



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*Note: The component's Properties panel will not reflect the updated range as the listed cell reference if a range is moved, expanded by inserting cells, or decreased by deleting cells. The new range is still bound and recognized by Xcelsius 2008. The embedded spreadsheet allows you to change the sort order of your data. However, this action is not read as an event by Excel, and as such does not prompt Xcelsius to update. You will not see any component bound to the sorted data update with the new data order. The new sort will be reflected in Preview mode or the exported visualization. An update can also be forced by rebinding the range in the component. Importing and Exporting data Xcelsius 2008 uses an embedded Excel based spreadsheet as its data source. This provides the ability to copy and paste data between the Xcelsius 2008 embedded spreadsheet and an Excel spreadsheet. Source data can be created either in the embedded Xcelsius 2008 spreadsheet directly or in Excel and brought into Xcelsius 2008.*

*Smaller pieces of data can be copy/pasted or whole files can be imported. Because Xcelsius 2008 files incorporate Excel data, spreadsheet data can easily be imported from Excel into Xcelsius 2008 or exported from Xcelsius 2008 to Excel. Xcelsius 2008 User Guide 55 4 Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools Importing Excel spreadsheets To use an existing Excel spreadsheet as the source data for your visualization, select Data > Import or use the Import Model button on the toolbar to import the file. on Note: When the Excel file is imported the data is copied and is no longer connected to the original data. Editing the original source file will not change the data imported into Xcelsius. WARNING: Importing an Excel spreadsheet will overwrite any data that is currently in the spreadsheet. Exporting data to Excel Select Data > Export to export the embedded spreadsheet data as an Excel file. Using the Format menu The Format menu provides various options for formatting the placement and layout of the components in the visualization. Access to the Themes and Color Schemes dialog boxes is provided under the Format menu. Note: These options are also available on the Format and Themes Toolbars.*

*Align With the Align options, you can align the boundaries of components or groups of components relative to the first component in the selection. Align functions require the selection of at least two components. The following Align options are available: 56 Xcelsius 2008 User Guide Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools 4 . . . . . Left Center Right Top Middle Bottom Make Same Size With the Make Same Size options, you can make the selected components the same width, height, or size relative to the first component in the selection. Space Evenly With the Space Evenly options, you can distribute a selection of components either horizontally (Across) or vertically (Down) so that there are even spaces between them. Note: To use the Space Evenly options, you must have more than one component selected.*

*Center in Canvas With the Center in Canvas options, you can center selected components on the canvas. You can center them vertically, horizontally, or both. Other commands on the Format menu The following commands are also available on the Format menu: Xcelsius 2008 User Guide 57 4 Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools . . . . . Bring to Front. Brings component to the topmost layer. Send to Back. Sends component to the bottom layer. Bring Forward. Brings component forward one layer. Send Back. Sends component back one layer. Group. Groups selected components as a single item. Ungroup. Ungroups a group of components. Understanding fonts in Xcelsius 2008 The following options are available for displaying fonts in Xcelsius 2008: · Device Fonts By default, Xcelsius 2008 uses this option for components within a visualization.*

*This option is recommended when creating models that require the extended character set as defined by Unicode. The Device Fonts option uses the SWF player to directly render the TrueType Font you select. Device Fonts also let you use different fonts for different components in the same visualization. However, depending on the TrueType Fonts installed on the end user's machine, the fonts in the visualization may not display properly. · Embedded Fonts This option generates the characters from the TrueType Font you select, and embeds them into the SWF file. Because the font is embedded in the SWF file, the font displays properly regardless of whether the user has the TrueType Font installed. However, this option increases the file size and the time required to load the visualization. Note: Asian character sets are not supported with Embedded Fonts due to the large number of characters they require. You must use Non-Embedded Fonts for situations where you require Asian characters. 58 Xcelsius 2008 User Guide Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools 4 To change the font for a visualization 1.*

*On the File menu, click Document Properties. The Document Properties dialog box appears. 2. If you want to use one embedded font for all components in the visualization: a. On the Font list, click the font that you want. b. Click OK. 3. If you want to use a different font for each component in the visualization, or you want to use non-embedded fonts: a. Click Use Device Fonts. b. Click OK. You can now use the Font Settings on the Component Properties panel to change the font used for that component. Xcelsius 2008 User Guide 59 4 Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools Using Themes Themes (formerly Skins) allow you to globally change the appearance of components. Each theme has a number of different components that you can use to maintain the look and feel of that particular theme. Combined with Color Schemes, you can use Themes to create a multitude of different looks for your visualizations. Select a theme from the main toolbar dropdown menu. or from the Format The Themes dialog box contains a list of available Themes and a preview of each. Selecting a new Theme will apply the Theme to all existing components as well as new components. Note: Some variations of a component type are only available when a particular Theme is applied (for example, half gauge is only in Graphite).*

*Changing the Theme with these unique components on the canvas will change those components to the default for that category of component. However, the original component type is retained and will revert back to its original form if the Theme is changed back. Using Color Schemes Color Schemes (formerly Styles) alter the color palette of your visualization. You can customize your entire visualization, or only certain components.*



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You can create your own Color Schemes based on an existing scheme or 60 Xcelsius 2008 User Guide Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools 4 combination of custom colors. Color Scheme only affect the colors of components, and do not affect fonts, text formatting, or alerts. Note: Color Schemes are not transferred with XLF files. If the Color Scheme used by an XLF is unavailable, the style will continue to be used by the existing components in the visualization, but it will not be able to be applied to new components. Changing the current Color Scheme To change the current Color Scheme, click the color scheme icon the Themes toolbar. Select a color scheme from the menu: on Select Create New Color Scheme to create a custom color scheme.

See Creating a Custom Color Scheme on page 63 Alternatively, you can change the color scheme by selecting Color Scheme from the Format menu. Xcelsius 2008 User Guide 61 4 Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools In the Color Schemes dialog box, select a color scheme from the list. Click OK to apply the selected Color Scheme to the components on the canvas. The Color Scheme that is applied to the visualization is displayed on the Component Explorer. Note: There is a default color scheme associated with each Theme that cannot be modified.

Select Current Theme Colors to revert to the original appearance of the visualization. Any color changes made will be reverted to their default values. Selecting a new color scheme will affect all components placed on the canvas after the new scheme is applied. If you would like to change the color scheme of components already on the canvas, you will need to select Apply To Existing Components. Click Create New to create a custom color scheme, or select a custom color scheme from the list and click Edit to modify the scheme.

Note: Only Custom color schemes can be edited. 62 Xcelsius 2008 User Guide Getting to Know Xcelsius 2008 Understanding the Xcelsius 2008 tools 4 For information on the Custom Color Scheme Dialog, see Creating a Custom Color Scheme on page 63 Creating a Custom Color Scheme You can create custom Color Schemes by modifying the parameters of an existing color scheme. To create a Custom Color Scheme 1. On the Format menu, click Color Scheme then select Create New, or select the Color Scheme icon from the toolbar and select Create New Color Scheme from the dropdown menu. The Color Schemes dialog box appears. 2. Select a color from the palette to edit its value. 3. Select a new color by clicking on the color picker or by manually entering the color values. 4.

You can modify the other colors individually, or Xcelsius 2008 can automatically modify the other colors in the scheme to be more or less alike than the selected color. To do this, select Auto Match Colors and use the slider to adjust the colors. 5. Select Advanced Settings to access the advanced color menu. Here, you can set the colors for individual elements in the visualization. 6. Click Save to save the new Color Scheme. Xcelsius 2008 User Guide 63 4 Getting to Know Xcelsius 2008 Previewing the Visualization 7. Click OK. The new color scheme is the active color scheme and will be applied to any components that are added to the visualization.

To apply the new color scheme, select Apply to Existing Components. Note: Click Reset before saving the Color Scheme to revert to the originally assigned color settings. Transferring Custom Color Schemes Color Schemes are transferred with XLF files. When a visualization with a custom color scheme is opened, the applied color palette will be displayed in the Colors toolbar icon. The custom color scheme will also be applied to any components added to the visualization.

However, the Custom color scheme will not appear in the list of available Color Schemes. To add the transferred color scheme to the host machine, follow the steps for Creating a Custom Color Scheme on page 63. Previewing the Visualization With Xcelsius 2008, you can test run your visualization as many times as you need. It lets you experiment with various combinations of components, colors, and layouts to make sure your visualization functions according to your specifications. Select File > Preview or use the Preview button design view and Preview.

to toggle between the You can also select File > Export > Preview to view the visualization in your default web browser. In Preview, you can interact with the visualization as you would when it is published. 64 Xcelsius 2008 User Guide Getting to Know Xcelsius 2008 Viewing sample Xcelsius 2008 visualizations 4 Viewing sample Xcelsius 2008 visualizations The sample visualizations included with Xcelsius 2008 show how some of the components and functions work.

Note: Samples include their own embedded spreadsheet data. Opening a sample will overwrite any data already in the embedded spreadsheet. The following User Guide Samples are included with Xcelsius 2008 (Samples in bold have step-by-step instructions in this User Guide): . . . . . Accordian Menu Alerts Charts Alerts Selectors Alerts Single Values Calendar Check Box Connection Refresh / XML Data Connection Drill-Down Chart Dual Axis Chart Dynamic Selected Item Dynamic Visibility Filter Filtered Rows Fisheye Picture Menu Filter Filtered Rows Fisheye Picture Menu Flash Variable Data Connection Grid History Icon Ignore End Blanks Image Line Chart List Box List Builder Xcelsius 2008 User Guide 65 4 Getting to Know Xcelsius 2008 Using Templates . . . . . Map Panel Container Play Selector Reset Button Slider Slideshow Sliding Picture Menu Status List Tab Set Ticker Tree Map Trend Analyzer Value Display Note: Samples include their own embedded spreadsheet data. Opening a sample will overwrite any data already in the embedded spreadsheet. To view sample Xcelsius 2008 visualizations 1. On the File menu, click Samples. The Samples dialog box appears.

2. In the Category box, click User Guide Samples. 3. In the Items box, click the component that you want to view an example of. A description of the component and a preview of the visualization are shown. 4. Click OK to open the sample visualization. Using Templates Xcelsius 2008 offers a set of templates you can use to create a new visualization. You can use the existing Xcelsius 2008 templates or you can create a visualization from scratch and save it as a template. For more information on creating and using templates, see Creating templates on page 157. 66 Xcelsius 2008 User Guide Getting to Know Xcelsius 2008 Using Templates 4 To View Xcelsius 2008 Templates 1.



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