



# Crystal Xcelsius User Guide

Crystal Xcelsius Professional 4.5

Windows



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# Getting to Know Crystal Xcelcius



# 1

chapter



## Overview

This chapter provides an introduction to Crystal Xcelsius, the components of the program, and the functionality of the program.

## What's New in Xcelsius version 4.5

Xcelsius now provides the following new components:

- **Candlestick and OHLC Chart components**  
The open-high-low-close and candlestick charts are primarily used to display stock data. Each marker corresponds to the four values, which are represented as lines attached to the marker on the OHLC chart and as colors on the candlestick chart. Open displays the opening price of the stock. High displays the highest price the stock achieved on that day. Low displays the lowest price the of the stock on that day. Close displays the closing price of the stock.
- **List View component**  
The List View component is a What You See Is What You Get representation of any group of cells from your Excel file. Each row allows multiple selections. The user can sort the columns and adjust the width of the columns in the exported SWF file.
- **Panel Set component**  
The Panel Set component is a series of framing options that enables you to easily navigate between files in a presentation. You can embed Jpegs or SWF files into the frames of the Panel Set component and adjust a variety of formatting features to customize the look of the component in your visualization.
- **Skins**  
Xcelsius has three new skins:
  - Graphite
  - Halo
  - Windows Classic

For information on skins, see [“Skins” on page 56](#).

Xcelsius now provides the following new features:

- **Logarithmic Scale**  
Logarithmic appears as an option on the X-Axis Scale and Y-Axis Scale lists in the Scale Behavior area on the Behavior tab of the Properties panel

of all the chart component but the Pie Chart component. This option plots the axis values on a logarithmic scale. Values plotted on a logarithmic scale appear at unevenly spaced intervals in the chart component. Smaller values have larger space intervals; larger values have smaller space intervals. Equal percentage changes are represented by equal distances.

- Animation Enabled

The Chart components, other than the Area Chart components, now have Animation Enabled as an option on the Behavior tab of the Properties panel. When selected this option adds animation to the chart components when the visualization is run. In chart components with bars, the bars grow and shrink when the data changes and the visualization is run. In point-based chart components the points grow to full size when the visualization is run.

- Export to Word

The Export to Word option allows you to export your visualizations to Microsoft Word. Visualizations in Word are dynamic and interactive.

- Export Model

The Export Model option lets you export a copy of the original Excel file imported into the visualization to your machine. The Excel file can be exported from a visualization that was created on your machine or on another machine. To export the Excel file, on the Data menu, click Export Model.

## Importing an XLF file from Xcelsius 3.0/3.5

Xcelsius supports the ability to import an Xcelsius visualization created with Xcelsius 3.0/3.5. This import ability lets current 3.0 and 3.5 customers upgrade their existing visualizations to take advantage of the new features of Xcelsius. Backup your current XLF, JPG and external SWF files before upgrading your visualization.

To upgrade your existing visualizations, start Xcelsius and select File->Open. Select the XLF that you would like to upgrade and click Open. Xcelsius will detect that the XLF is an older visualization and warn the user that it is going to import the visualization into Xcelsius, and that this may result in certain features not functioning.

**Note:** After you import and save your visualization with the latest Xcelsius version, the visualization cannot be opened using Xcelsius 3.0/3.5.

Xcelsius minimizes the impact of migrating visualizations from Xcelsius 3.0/3.5 to this new version. However, it is possible that some of your visualizations, or more specifically, some components, will look slightly different from the original 3.0/3.5 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.
- Some custom colors appear to be slightly different. This is due to art improvements and the introduction of skins.
- The 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-link the properties that are tied to the spreadsheet.

Xcelsius supports Dynamic Data Sources across all components. This enhancement impacts visualizations that contain selectors and charts. Compare the new visualization to the Xcelsius 3.0/3.5 visualization to verify that it is functioning correctly.

## Understanding the Xcelsius system

### How Xcelsius differs from traditional reporting applications

Xcelsius 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 does this by letting users participate in the report creation process and analysis.

### How Xcelsius works

Import an Excel file into Xcelsius, create the visualization, and publish the visualization.

► **To create an Xcelsius visualization**

1. Import an Excel file that contains the information you want to publish.
2. Build the visualization.
3. Compile and publish the visualization.



## Step 1: Import the Excel file

The first step in creating a visualization is to import the Excel file that contains the data to support your visualization. During this step, Xcelsius makes a copy of the Excel file and imports the spreadsheet, including formulas, values, and cell formatting. Once the Excel file is imported, a copy of it is embedded into Xcelsius.

You can continue using the original Excel file, but if you delete or add rows, columns or data, you need to re-import the Excel file.

## Step 2: Build the visualization

After the Excel file is imported, you can use Xcelsius to build the visualization. Xcelsius contains components—from backgrounds to charts—that can be selected and linked to one or more cells in the embedded spreadsheet. If you're creating a chart, for example, you can select the chart component, click it, and select the range of chart data from the spreadsheet. This process is similar to the way a chart is created using Excel.

Xcelsius lets you create dynamic visualizations by pointing and clicking your mouse. You can combine two or more components and link them to the spreadsheet. For example, you can define point-and-click radio buttons that combine with a chart to show different information on the chart when each radio button is clicked.

## Step 3: Compile and publish the visualization

The final step is to preview and export the visualization. Previewing lets you test your visualization and see how it will look and behave when it is exported.

Xcelsius offers a variety of ways to publish your visualization. For more details on how to publish your visualization, see [“Exporting Crystal Xcelsius Visualizations” on page 75](#). Xcelsius visualizations can be published in the following formats:

- Macromedia Flash SWF
- HTML
- Microsoft PowerPoint Slide
- Adobe PDF
- Microsoft Outlook
- Microsoft Word
- BusinessObjects Enterprise

## 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.

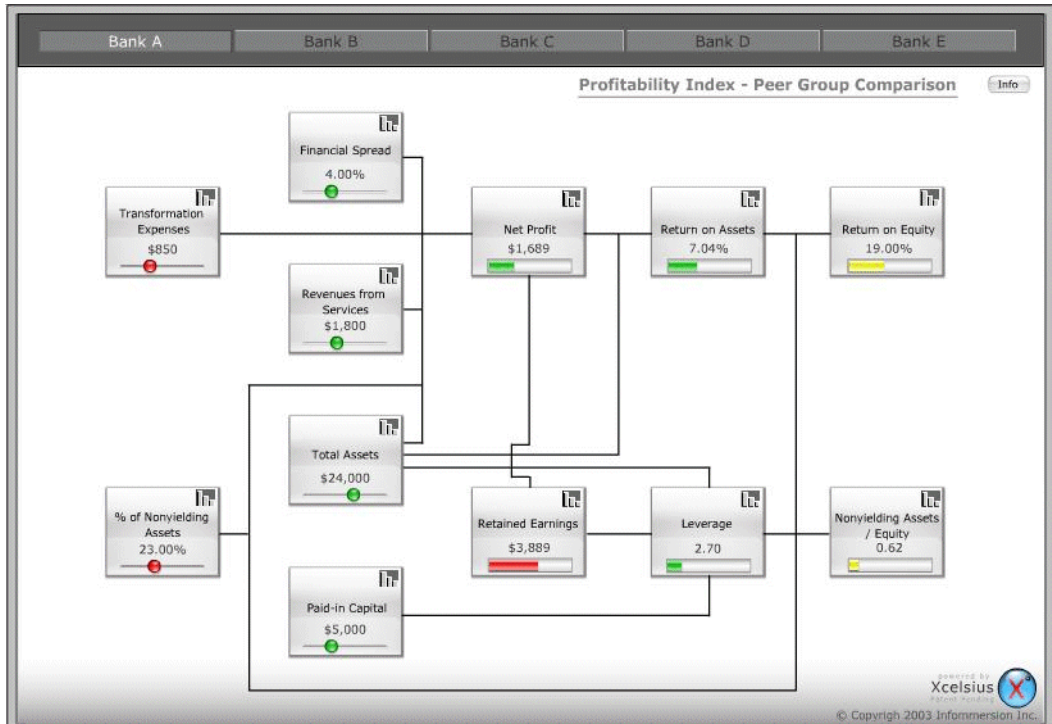
Xcelsius visualizations conform to SWF file format. SWF is the vector-based graphics format designed to run in the Flash Player. Because a SWF file is vector-based, its graphics are scalable and play back smoothly on any screen size and across multiple platforms. Also, a vector-based file usually has 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.

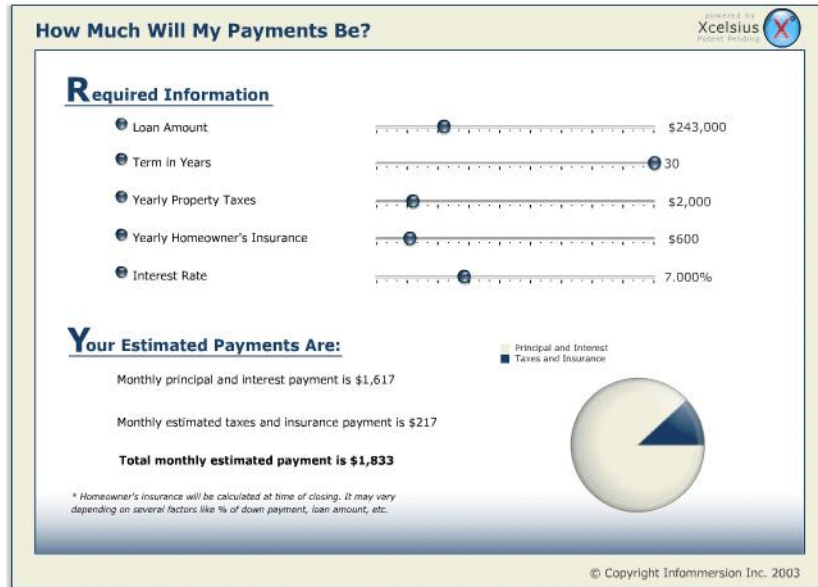
## Example 1: What-if presentation using alerts

This visualization shows the return-on-equity (ROE) for a financial institution against its peer group performance. The alert colors are triggered, comparing the selected bank against the peer group average.



## Example 2: What-if presentation using a calculator

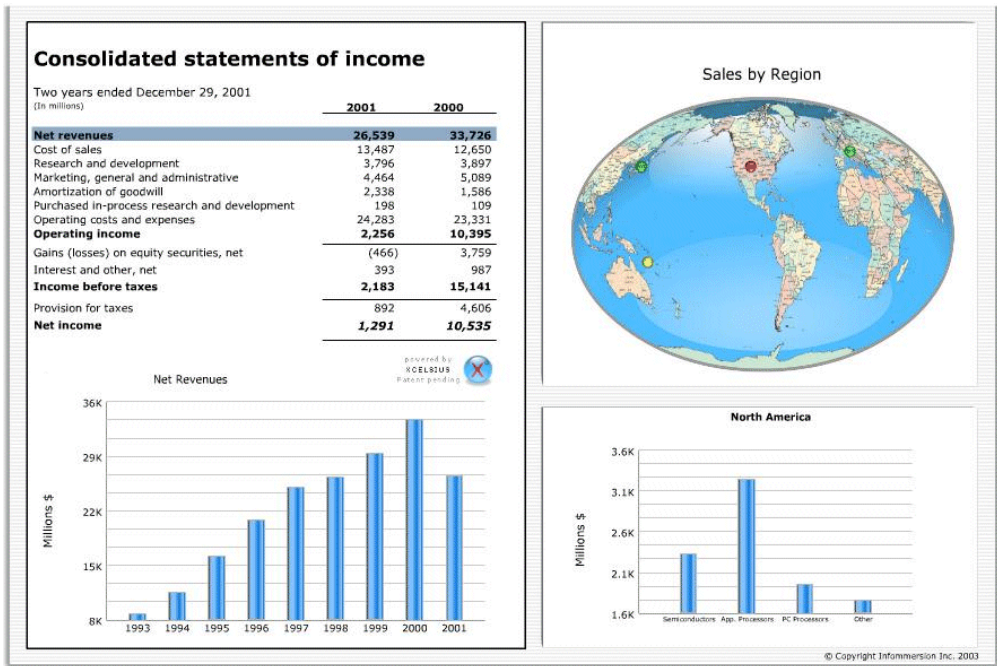
The following visualization was created to calculate the monthly payment for a home loan. Users can adjust the input values by moving the sliders. The calculator dynamically changes and displays the new values.





### 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 against competitors.

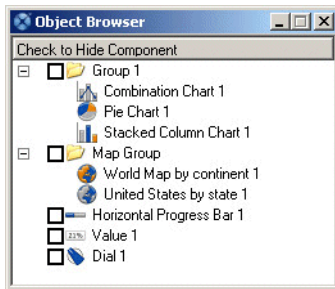


## Understanding the Xcelsius tools

Before you begin using Xcelsius, take a moment to familiarize yourself with the interface by reading the following sections.

### Using the Object Browser

With the Object Browser, you can select, hide, cut, copy, paste, delete, bring forward, move back, group, ungroup and access Properties panels of components.



The Object Browser is opened by default when you start an Xcelsius session. If you have closed the Object Browser, to re-open click Object Browser Window on the View menu.

### Right-click context menu

Display a context menu by right-clicking on any component in the browser.

This is the same menu displayed by right-clicking on a component on the canvas, unless the item is grouped, when the menu displays the common properties of the group.

### Selecting components

To select a component on the Object Browser click the component name or icon to select the component on the canvas.

To select multiple components click a component name or icon to select it, and then hold down the CTRL key while you click the other components, if they are not adjacent to one another. If the components are adjacent hold down the SHIFT key.

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 won't work in the other order.

Select all components by selecting any one component then pressing CTRL+A.

**Note:** You cannot select a component that is marked as hidden.

## Hiding components

To hide a component on the Object Browser select the check box next to the component name.

To hide multiple components select any of the check boxes of a multiple selection.

To hide all components select any one component, then press CTRL+A to select all components, and check the box next to any one component.

## Grouping components

Selected objects in the Object Browser can be grouped in the following ways.

- Group selected components by right-clicking on any of the selected components and clicking Group from the context menu.
- Select several components in the Object Browser, then click Group on the toolbar.



Once grouped, the components will appear in the browser in tree form with a folder representing the whole group.

Expand the group folder by clicking the + button or double-clicking the folder icon or the group label.

Once the group is expanded, access the Properties panel for a component within the group by either double-clicking the component or by right-clicking for the context menu. In this way properties can be edited without ungrouping the components.



**Tip:** To ungroup selected components, click Ungroup on the toolbar.

## Deleting components

Delete any selected components by pressing DELETE or selecting Delete from the right-click context menu.

Deleting a component can be undone pressing CTRL+Z or clicking Undo on the Edit menu.

To delete components within a group you must ungroup them.

## Opening properties panels

Properties panels for components, either alone or in a group, are opened with the same procedures:

- Double-click the icon or label.
- Select the component and press ALT+ENTER.
- Right-click the component and click Properties.

Properties panels that can be opened 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 a Properties panel is opened for one component you can navigate to the Properties panel of another component by clicking on the entry in the Object Browser.

## Renaming components

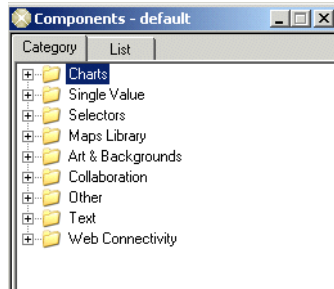
Each component is assigned a default browsing name when placed on the canvas. This is the name that appears in the title bar of the Properties panel and in the entry in the Object Browser.

You can override these default names to provide your own. Double-click slowly on the component name in the Object Browser, a fast double-click will open the Properties panel. This will put the name in label-edit mode. Edit the name and then press ENTER or click on another component.

**Note:** You cannot rename a component that is marked as hidden.

## Using the Components Explorer

The Components Explorer shows the available components.



The window contains two views:

- A category view where the components are organized in groups in a tree view according to their functionality.

In the category view you can select a specific category and open that folder to see those components that apply to your selection. Xcelsius provides categories that are both frequently used in the market and unique to Xcelsius:

- Art & Backgrounds
  - Charts
  - Collaboration
  - Maps
  - Selectors
  - Single-Value
  - Text
  - Web Connectivity
  - Other
- A list view where the components are organized alphabetically.  
In the list view you can select a component alphabetically by name.

### Navigating through components in the Components Explorer

You can navigate to a component within the Components Explorer using either the mouse or keyboard.

To navigate with the mouse, double click on the category and any subcategories until you can select the component.

To navigate with the keyboard, click anywhere within the category window to select it, and then type the first letter of the category you wish to open. To open a folder when it is selected, use the right arrow key; to close a folder when it is selected, use the left arrow key. To navigate through subcategories type the first letter of the subcategory. You can also move up and down the tree using the up and down arrows.

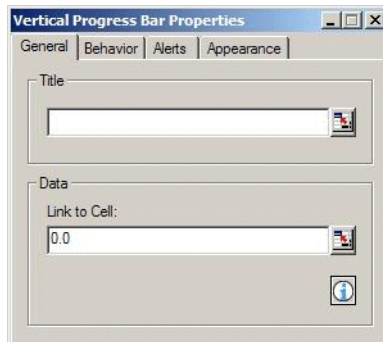
Navigation using keys in the list view of the components operates in the same way, except that there are no folders.

Each time a component is selected, a preview of how that component looks on the canvas will appear in the preview window. Folder selection shows a blank in the preview window.

## Using the Component Properties panel

The Component Properties panel displays the specific functionality of each component. After you place a component on the canvas area, you can access the Component Properties panel by double-clicking the selected component. In general, the Component Properties panel has the same structure for all components, but the functionality described is specific to each individual component.

The Component Properties panel has the following tabs:



- **General Tab**  
Describes the basic and minimum required functionality for the selected component. Typically, it contains an area for the title and an area for the Data Source Link or the values that the component represents. See [“Step 2: Select the data sources” on page 34](#) for more information.

- **Behavior**  
Describes functions related to the way the component will work on the visualization. Typically, it contains an area for defining the Display Status, entry effects, and functions related to limits and interactivity. See [“Dynamic Visibility functionality” on page 66](#) for more information.
- **Alerts**  
Contains all the related functionality required when using alerts. On this tab, you can define the number of alert colors, the colors used, and the target or budget. See [“Alerts” on page 69](#) for more information.
- **Appearance**  
Contains a series of functions, and in some cases sub-tabs, that let you modify the appearance and final look of each component. On this tab, you will find options like font size, title location, and colors.
- **Drill Down**  
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 109](#).  
**Note:** This tab applies only to Chart components.

## Component Properties for multiple selections

By selecting multiple components on the canvas, you can simultaneously edit Component Properties for each component in your selection. To access Component Properties for multiple components select your components and double click the selection. You can also access the component 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. For example, if your current selection contains three Line Chart components, you will be able to access the Component Properties specific to the Line Chart. Any change made to the properties will apply to each component in the selection. Component Properties of components of mixed types or groups are limited to the Display Status parameters of the Behavior tab. When a number of components are grouped, the Component Properties for individual components within that group may be edited by right-clicking on that sub-group component in the Object Browser window see [“Using the Object Browser” on page 18](#).

## Using the canvas

The canvas area is the white work area where you place components to create a visualization.

## Placing components on the canvas using drag and drop

- ▶ **To place a component on the canvas area using drag and drop**
  1. On the Components Explorer click a component.
  2. Holding down the left mouse button, drag the component onto the canvas.
  3. Release the mouse button.

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

- ▶ **To place a component on the canvas area using point and click**
  1. On the Components Explorer click a component.
  2. Click the canvas area.
  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 optimal size according to the components you are using.



In addition, you can use the plus and minus buttons on the toolbar to shrink or grow the canvas in smaller increments.

## Fitting the canvas to the window



To resize the canvas so that it fits in the window, 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 Properties on the File menu. The Document Properties dialog box appears.

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 such as a Portlet 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 (XLF is the extension to which Xcelsius saves its internal files) or when you save your visualization as a template.

## Using the Import Model button

Use the Import Model button on the tool bar to import the Excel file that contains the data to support your visualization.



If it is the first time you are importing an Excel file for the visualization, you must browse for and select the file in the Import Model dialog box. If you have already imported an Excel file into the application, you have the option to either re-import it or select a new one.

### ► Importing a spreadsheet from Excel into Xcelsius

1. Click the Import Model button.

The Import Model dialog box appears.



2. Click the Browse button.

The Open dialog box appears.

3. Select your Excel file and click **Open**.

You return to the Import Model dialog box.

4. Click **OK**.

Importing an Excel file creates a mirror copy of your Excel file in the Xcelsius application. This mirror copy is independent of your original file. Therefore, if you make changes to your Excel file that affect the Xcelsius visualization, you will have to re-import the Excel file. See [“Updating data for a visualization” on page 36](#) for more instructions.

## Using Font Options

You can change the font used by components in a visualization by using Font Options on the File menu.

## Unicode Font Options

Unicode Font Options provides more options for customizing the font used in the visualization. The following options are available for displaying fonts in Xcelsius:

- **Embedded Fonts**

Xcelsius uses embedded fonts by default. 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 also increases the time required to load the visualization, and the file size.

**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.

- **Non-Embedded Fonts**

This option is recommended when creating models that require the extended character set as defined by Unicode. Non-Embedded Fonts uses the SWF player to directly render the TrueType Font you select.

Non-Embedded Fonts also lets you use different fonts for different components in the same visualization. However, depending on the TrueType Fonts installed on the user's machine, the fonts in the visualization may not display properly.

**Note:** Some components, such as chart components, do not support Non-Embedded Fonts.

► **To change the font for a visualization**

1. On the **File** menu, click **Font**.

The Font Options dialog box appears.

2. Choose the font option that you want.

- 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**.
- If you want to use a different font for each component in the visualization, or you want to use non-embedded fonts:
  - a. Click **Unicode Font Options**.
  - b. In the **Unicode Font Options** dialog box, click **Use Non-Embedded Fonts**.

- c. Click **OK**.

You can now use the Font Settings on a component's Properties panel to change the font used for that component.

## Setting the Maximum Rows

With the Maximum Rows command on the Data menu, you can set the maximum number of rows that Xcelsius will allow as a valid data source selection. If you set a large maximum number of rows, the time required to load a visualization will be affected.

If you try to specify more rows than the Maximum Rows setting for a data source, a warning message that says "Truncation occurred" will appear.

## Using the Format menu

The Format menu provides various options for formatting the appearance of the components in the visualization.

### Align

With the Align options, you can align the bounding boxes 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:

- Left
- Center Horizontal
- Right
- Top
- Center Vertical
- Bottom

### Make Same Size

With the Make Same Size options, you can make the selected components the same width, height, or size as another component.

### 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.

## Center in Document

With the Center in Document options, you can center selected components on the canvas.

**Note:** To use the Center in Document options, you must have more than one component selected.

The following options are available:

- Vertical
- Horizontal
- Both

## Other commands on the Format menu

The following commands are also available on the Format menu:

- 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.

## Using the Grid Tool

The Grid command on the View menu provides a layout tool that can aid in positioning components on the canvas. 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.
- Vertical Spacing  
This option sets the vertical spacing intervals for the grid in pixels.
- Horizontal Spacing  
This option sets the horizontal spacing intervals for the grid in pixels.

## Creating backup files in Xcelsius

With the Options command on the Tools menu, you can set how you want Xcelsius to create backup versions of the XLF file that you are working on:

- If you do not want to create a backup XLF file, make sure the options in the Save Options area are cleared.
- If you want to create a backup XLF file, select Always Create a Backup Copy.
- If you want to create a backup XLF file at specific intervals, select Automatic Backup Save Every, and then set the interval.

## Previewing the visualization

With Xcelsius, you can preview your final visualization as many times as you need. It lets you experiment with various combinations of components, colors, and layouts to make sure your visualization meets your requirements.

Use the Preview button to toggle between the design view and preview.

In Preview, you can interact with the visualization as you would when it is published.

## Viewing sample Xcelsius visualizations

The sample visualizations included with your deployment of Xcelsius show how some of the components work.

### ► To view sample Xcelsius 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. To view a sample visualization, click **OK**.

## Dynamic and static data sources

Components have two levels of interactions relative to the spreadsheet:

- Dynamic
- Static

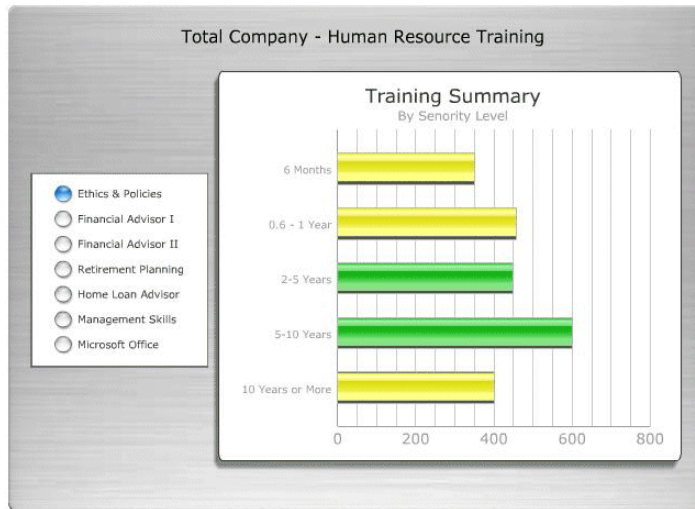
### Dynamic data sources



The content of the cells can vary during a simulation process and Xcelsius will update its content.

#### Example

You want to create a visualization containing a radio button and a chart, to show the progress of several Human Resources Training Program courses. You need to use the same chart for each course, so that your visualization is simple and dynamic. It will look like this:



Using Dynamic Data Sources lets the chart data change with each selection you make on the radio button. The radio button inserts a row that contains the data for each course on a range that is linked to the chart. Since the chart contains the Dynamic Link on the Data Source, the chart content changes with each selection you make on the radio button. This is described in more detail in [“Using the Selector components” on page 46](#).

## Static data sources



The content of the cells won't vary during the simulation; therefore, Xcelsius won't update its content.

### Example

The Human Resources chart using the chart and radio button components while remaining dynamic in functionality can also have a static data source. The Display Status Key imported value determines the visibility of the chart. The value can be set to display the chart when the visualization is run. The Display Status Key value is fixed so that the chart will always display. For example, if you link the chart to a Display Status Key cell with a value of 0.25999 and manually change the value in the Display Status Key box, when the visualization is run the chart will not be visible as the Display Status values do not match.

## Using templates

Xcelsius offers a set of templates you can use to create a new visualization. You can use the existing Xcelsius 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 70](#).

## Global Styles

Global Styles are a set of appearance parameters that let you change the default visuals of new components. You can also apply Global Styles to existing visualizations to change their overall appearance. Style parameters are broken up into three major categories:

- Styles
- Text & Labels
- Buttons and Backgrounds.

In the Styles category you will find Markers, Lines and Borders.

All components can be generally defined as being constructed of certain pieces, those pieces can be grouped in the above categories. These categories, when defined as a whole, create the global style. These parameters consist of only color parameters and do not affect fonts, text formatting or alerts.

**Note:** Global Styles are not transferred with Xcelsius authoring file, or XLF files. Opening an XLF does not load the Global Style used in the XLF into the machine it is opened on. If the Global Style 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.

For more information see [“Using Global Styles” on page 71](#).





# Creating and updating Crystal Xcelsius visualizations



# 2

chapter

## Overview

This chapter introduces the process of creating and maintaining Xcelsius visualizations.

## Creating a visualization

- ▶ **To create an Xcelsius visualization**
  1. Import the Microsoft Excel file that contains the data to be used in the visualization.
  2. Link the Xcelsius components to the spreadsheet.
  3. Preview the visualization and publish it.

### Step 1: Import the Excel file

The first step for creating an Xcelsius visualization is to import an existing Microsoft Excel file that contains the data you want to use in your visualization.

- ▶ **Importing a spreadsheet from Excel into Xcelsius**

1. On the **Data** menu, click **Import Model**.

The Import Model dialog box appears.

**Tip:** You can also access the Import Model dialog box by clicking the Import Model button on the tool bar.

2. Click the Browse button.

The Open dialog box appears.

3. Select your Excel file and click **Open**.

You return to the Import Model dialog box.

4. Click **OK**.

**Note:** The Excel file is imported into the Xcelsius application as a copy of your original file. You can continue making changes or modifications in your original file and then re-import the Excel file. See [“Updating data for a visualization” on page 36](#) for detailed steps.



### Step 2: Select the data sources

The second step for creating an Xcelsius visualization is to select the data sources linked to the components. With this step, you assign one or more cells from your imported Excel file to one or more Xcelsius components.

## Example

You need to show Revenues by Store using a Column Chart, and the Price per Unit using a Horizontal Slider.

### ► Selecting the data source for the components

1. Place the components on the canvas.
2. Double-click the column chart component to open the Properties panel.  
For more information, see [“Using the Component Properties panel” on page 22.](#)
3. Click the **Data Range** cell selector button.
4. Select the range of cells that contain the data for the column chart from the imported spreadsheet, and click **OK**.
5. Type or link the chart title and subtitle.
6. Type or link the axis names and category labels.
7. Click the horizontal slider component to open the Properties panel.
8. Click the **Link to Cell** cell selector button.
9. Select the Price Per Unit cell from the imported spreadsheet, and click **OK**.



## Step 3: Previewing and publishing the visualization

The third step is to preview and publish the visualization. You can see a preview of the live visualization, test the simulation result, make the required adjustments, and finally, generate the SWF or Flash animation that contains the visualization. Then the visualization is ready for publishing and distribution.

You can use the Preview button on the tool bar to toggle between the design view and preview. In preview, you can interact with the visualization as you would when it is published.

Once you are satisfied with the results of the preview, the visualization is ready to be published. You can publish your visualization using one of the following methods:

- Export as Macromedia Flash (SWF)
- Export as HTML
- Export to Microsoft PowerPoint
- Export as Adobe PDF
- Email Content Using Microsoft Outlook
- Export to Microsoft Word

See “Exporting Crystal Xcelsius Visualizations” on page 75 for more information.

## Updating data for a visualization

The Export Settings command on the File menu lets you specify how you want to update data. You can re-import the Excel file and replace the entire visualization, or you can create more customized and sustainable data replacement methods. The following options for updating the data in your visualization are available:

- **Use Current Excel Data**  
This option takes the data as it exists in the currently imported visualization. This is the default option.
- **Use Another Excel File**  
This option lets you specify a different Excel file from which to take data at export time.

## Re-importing the Excel file

When you are creating a visualization you may need to re-import the Excel file into Xcelsius. This is normally because you have decided to add or modify the data in the spreadsheet. Since Xcelsius makes a copy of the original Excel file and imports the copy, when you make changes to the original Excel file, you will have to re-import it.

When re-importing the Excel file, be aware that if you inserted rows, columns or data, the links that you previously created may be damaged. Xcelsius will keep the link as a static reference. For example, if originally you linked a chart to the range A2:H2, and after that you modified the Excel file the chart range is now A3:H3, you will need to manually adjust the link after re-importing the Excel file. Xcelsius will continue using the range A2:H2 until you manually change the link.

### ► To re-import the Excel file

1. On the **View** menu, click **Import Model**.

**Tip:** You can also re-import the Excel file by clicking the Import Model button on the tool bar.

2. Select the Excel file to be imported.
3. Select the re-import method.

For more information, see the list following this procedure.

#### 4. Click **OK**.

The Import Model dialog box provides the following options for specifying how data in the re-imported spreadsheet interacts with the existing links in the visualization:

- **Refresh Data Sources**  
 This action will import the selected spreadsheet. Use this option when the Excel file is the same or with small changes and you need to keep all previous links. All previously established links to the spreadsheet will be saved. However, if since the last import you have inserted, deleted or modified rows, column or data, it is possible that the links will be affected. Review the links before saving the visualization.
- **Clear Data Sources**  
 This action will import the selected spreadsheet and all previously established links will be lost. Use this option when the Excel file is significantly different and you need to delete all the links.
- **Refresh Spreadsheet Format**  
 This option is available only when Refresh Data Sources is selected. Use this option when some spreadsheet formatting parameters have changed which you want updated.

## Re-importing with renamed sheets

Re-importing a spreadsheet that has a sheet that has been renamed will cause all links and formulas to be lost. A warning message will recommend two things:

- Use the same sheet name.
- Re-import using the Clear Data Sources option.

## Using the Use Another Excel File option

With the Use Another Excel File option you can generate SWF files that use different data than the Excel file that the visualization currently uses.

### Example

In a visualization that uses the retail price to calculate the expected revenue, you want Xcelsius to update a single cell while maintaining the original imported values in all other cells.

► **To replace data from another Excel spreadsheet**

1. On the **Data** menu, click **Replace Data Selection**.  
The Replace Data Selection dialog box appears.
2. Click **Add**.
3. In the **Range Name** box, type “Retail Price”.
4. Click the **Range Selection** cell selector button.  
The imported spreadsheet and the Select a Range dialog box appear.
5. Select the Retail Price cell and click **OK**.  
Only the selected cells will be modified each time the Excel spreadsheet is re-imported.  
You return to the Replace Data Selection dialog box.
6. Click **OK**.
7. On the **File** menu, click **Export Settings**.  
The Export Settings dialog box appears.
8. Click **Use Another Excel File**.
9. Click the Browse button and navigate to the Excel file to be used as the new data source.
10. On the **File** menu, point to **Export**, and click **Macromedia Flash (SWF)**.  
The SWF file using the new data source is generated.
11. With your visualization on the canvas, on the **Data** menu, click **Replace Data Selection**.

This function lets you select the cell(s) that you want Xcelsius to modify each time the Excel file is re-imported. All other cells will remain the same.

You have created a sustainable visualization. The new SWF will take the latest Retail Price available from the Excel file. When the Retail Price changes, all you have to do is to generate a new SWF file. All other cells not affected by the Retail Price will remain the same.



# Using Crystal Xcelsius Components



# 3

chapter



## Overview

This chapter introduces the Crystal Xcelsius components and their most relevant functionality.

## Using chart components

Each type of chart functions in a particular way appropriate to different types of visualizations:

- **Bubble Chart**  
A chart that lets you compare a group or series of items based on three different parameters. It has an X-axis and Y-axis to represent the item location over the chart area, and a Z value to represent the item size. You could use this chart to represent the market composition with the X-axis representing the ROI by industry type, the Y-axis representing the Cash Flow, and the Z-axis representing the Market Value.
- **Line Chart**  
A single- or multi-line chart ideal for showing tendency over a period of time. Use this chart in visualizations that emphasize a trend line, such as Stock Prices or Revenue History.
- **Pie Chart**  
A chart that represents the distribution or participation of each slice or item over a certain total that is represented on the overall pie value. The pie chart is appropriate for visualizations, such as Revenue Contribution by Product. The overall pie size represents the total revenues. Each slice represents a different product.
- **XY Chart**  
A chart that displays data requiring two magnitudes to complete the analysis. The XY chart shows each data point as a result of the intersection of X values and Y values. You can use the XY chart in visualizations that compare ROI on the X axis against Market Value on the Y axis for a group of companies.
- **Combination Chart**  
A combination column and line chart ideal for displaying a range of values and a trend line for those values. You can use the combination chart in visualizations examining stocks. A line series will show the historical stock price over the year, and a column chart will show the volume of trading for that stock.



- **Bar Chart and Column Chart**

A single- or multi-bar chart that shows and compares one or more items over a period of time or in a specific range of values. You could use a column chart in visualizations that contain the quarterly headcount by region.

- **Stacked Column Chart and Stacked Bar Chart**

A chart that compares several variables over a period of time. Stacked bars compare one or more variables by adding one variable on top of another. This chart compares several variables over a period of time such as Marketing Cost, General Cost, Administrative Cost. Each one of the cost components is presented in a different color and each portion represents a different variable. The total bar size represents the Total Cost.

- **Area Chart**

A standard chart with vertical and horizontal axes. Each point along the horizontal axis represents a data point. The actual values for each data point are plotted against the vertical axis. For each series, colored areas are created by connecting the plotted points and the horizontal axis. Use this chart in visualizations that emphasize a trend line, such as Stock Prices or Revenue History.

- **Radar Chart and Filled Radar Chart**

A chart with axes that radiate outwards from the center of the chart. These charts can have several axes. They are useful for plotting multi-dimensional sets of data. In the filled radar chart, the shape created by connecting the points along each axis is filled in with color. You could use the radar charts to compare aspects of stocks. One axis could display the price, another the volume, another the Price to Earnings ratio, and others any other relevant data on.

- **Stacked Area Chart**

A standard chart with vertical and horizontal axes. Each point along the horizontal axis represents a data point. The actual values for the data points are plotted against the vertical axis, with each series adding to the total value. You could use the stacked area chart to compare the revenue for multiple products as well as the combined revenue of all the products and the contribution of each product to that combined revenue.

- **OHLC Chart and Candlestick Chart**

The open-high-low-close and candlestick charts are primarily used to display stock data. Each marker corresponds to the four values, which are represented as lines attached to the marker on the OHLC chart and as colors on the candlestick chart. Open displays the opening price of the

stock. High displays the highest price the stock achieved on that day. Low displays the lowest price the of the stock on that day. Close displays the closing price of the stock.

## How to create a chart

Creating a chart in Xcelsius is similar to creating a chart in Excel. The minimum requirement is to have a list of values in an adjacent range of cells. After this, you can enhance your chart with some basic information such as Title, Subtitle, Axis Titles and Series Names.

### Example

To create an Xcelsius visualization that shows the Revenues per Store for a Car Dealer company, you will need an Excel file that contains an adjacent range of cells with this information.

#### ► To create an Xcelsius visualization with a chart component

1. Import the Excel spreadsheet into Xcelsius.  
For information on importing spreadsheets into Xcelsius, see [“Using the Import Model button” on page 25](#).
2. Place a column chart on the canvas.
3. Double-click the column chart component to open the Properties panel.
4. Type the title of the chart in the **Chart Title** box.  
**Tip:** You can also click the Chart Title cell selector button to select the chart title from the imported spreadsheet.
5. Type the subtitle of the chart in the **Chart Subtitle** box.  
**Tip:** You can also click the Chart Subtitle cell selector button to select the chart subtitle from the imported spreadsheet.
6. Click the **Data Range** cell selector button and select the range of values from the imported spreadsheet.  
The data range is the list of values to be presented on the chart component. Select the full range of values you want to display on the chart component.
7. Type the axis name in the **Category (X) Axis** box.  
**Tip:** You can also click the Category (X) Axis cell selector button to select the axis name from the imported spreadsheet.
8. Type the axis name in the **Value (Y) Axis** box.  
**Tip:** You can also click the Value (Y) Axis cell selector button to select the axis name from the imported spreadsheet.

**Note:** In some cases, you must create a multiple bar chart. To do this, select the Series options and select one or more series. Each series represents one group of bars that are represented with the same color.

## Sample visualization: Drill Down Chart functionality

Xcelsius charts can behave as selectors. Including selector functionality in the charts lets you create visualizations that have drill-down charting functionality.

This example creates a visualization that displays a pie chart that contains yearly sales data for several branches. When the user clicks on a slice of pie for a given branch the visualization will display the monthly sales data for that branch on a column chart.

**Note:** You can find the spreadsheet, sample XLF file, and sample SWF file for this visualization in the following location:

C:\Program Files\Business Objects\Crystal Xcelsius Designer 4.5\samples\User Guide Samples

### ► To create an Xcelsius visualization with a chart with drill-down functionality

#### 1. Import the Excel spreadsheet into Xcelsius.

For this example the spreadsheet should contain monthly sales data for different branches.

For information on importing spreadsheets into Xcelsius, see [“Using the Import Model button” on page 25](#).

#### 2. Place a pie chart component on the canvas.

#### 3. Place a column chart component on the canvas below the pie chart component.

#### 4. Double-click the pie chart component to open the Properties panel.

#### 5. Click the **Data Range** cell selector button and select the data range from the imported spreadsheet.

For this example, select the cells that contain the sales totals for the individual branches.

#### 6. On the **Drill Down** tab, click **Enable Drill- Down**.

The Drill Down options for the pie chart component can now be configured.

#### 7. On the **Insert Value** list, click **Rows**.

This will let you insert a row of data for each item that is placed in the Destination pane.

8. Click the **Insert Value In** cell selector button and select an empty row of cells from the imported spreadsheet.  
**Note:** The cells must be empty or the drill down functionality will be compromised.
9. Click the **Source Data** cell selector button and select the source data from the imported spreadsheet.  
For this example, the range of cells should contain the monthly sales data for the branches.
10. Close the Properties panel for the pie chart component.
11. Double-click the column chart component to open the Properties panel.
12. Click the **Data Range** cell selector button and select an empty row of cells from the imported spreadsheet.  
For this example, the range of cells must be empty as it will have the data on the monthly sales of the branch selected on the pie chart inserted into the row.
13. Click the **Chart Title** cell selector button and select an empty cell.  
For this example, the cell must be empty as the title for the chart selected on the pie chart component will be inserted into this cell.
14. Close the Properties panel for the column chart component.
15. Click the **Preview** button to view the interaction between the pie chart and the column chart components.  
As you click on slices of the Pie Chart, the column chart will update to show the monthly sales data for the selected branch.

## Using single value components

Single value components let you add user interactivity to your visualizations. Single value means that the components are linked to a single cell in the spreadsheet. After that, the component lets you modify or represent the value of that cell.

Each component can be used to customize the interactivity of a visualization:

- **Dial**  
An input component. A dial represents a variable that can be modified to affect other components. For example, to represent the Price per Unit.
- **Slider**  
An input component. A slider represents a variable that can be modified to affect other components. For example, to represent the Price per Unit.

- **Progress Bar**  
An output component. A progress bar represents a value that changes and fills the progress bar area depending on its value.
- **Gauge**  
An output component. The gauge measures the result of changes in the Excel cell to which it is linked. If you link the gauge to a cell that contains a formula, the gauge reflects the modifications each time the value changes.
- **Value**  
An input when bound to a cell containing a formula, and an output when bound to a cell containing a value. The value component represents a single cell of your Excel file.
- **Spinner**  
An input component. A spinner represents a variable that can be modified to affect other components. Users can interact with the spinner by clicking the up and down arrows or by typing a value into the text box.
- **Play Button**  
An input component. The play button is used to increase the value of a cell in your visualization. For example, link the play button to a cell that contains the headcount. What will happen if the headcount increases by one, two, three, or more? The play button takes the initial headcount value and increases its value systematically.

## Input vs. output

Single value components have been classified as input and output components, but you can use any single value component and represent it as an input or output.

However, what really dictates whether a single value component is an input, that is permits user interaction, or output, is the cell to which it is linked. If the cell contains a formula of any type, the component is interpreted as an output. If the cell does not contain a formula, it is represented as an input.

For example, if you have a slider linked to a cell that does not contain a formula, you can modify the slider value by dragging the slider object, thereby modifying the cell value. If you have a slider linked to a cell that does contain a formula, you cannot modify the slider value.

## Sample visualization: value component

A store supervisor wants to measure the effect that increasing or decreasing the price of an X product has over a certain level of products normally sold over a period of time.

Price per Unit is the variable that we want to modify. This cell affects the revenues for all stores. Quantity sold is the normal volume of products sold over a period of time. Revenues are calculated as quantity \* price.

**Note:** You can find the spreadsheet, sample XLF file, and sample SWF file for this visualization in the following location:

C:\Program Files\Business Objects\Crystal Xcelsius Designer  
4.5\samples\User Guide Samples

### ► To create an Xcelsius visualization using a value component and a chart component

1. Import the spreadsheet into Xcelsius.  
For information on importing spreadsheets into Xcelsius, see [“Using the Import Model button” on page 25](#).
2. Place a column chart component on the canvas and configure it.  
For information on configuring the column chart component, see [“Using chart components” on page 40](#).
3. Place a value component on the canvas in the upper-left corner.
4. Double-click the value component to open the Properties panel.
5. Click the **Link to Cell** cell selector button and select the price per unit cell from the imported spreadsheet.
6. Customize the appearance of the value component.

You can increase or decrease the Price per Unit by dragging the Value Component. Double-clicking the Value component lets you type in the value. As the Value Component is linked to a cell that affects the Revenues, the chart dynamically changes to reflect the new revenues by store.

## Using the Selector components

The functionality of selector components lets you create a visualization with multiple selections.

Each selector can be combined with other components to create a dynamic visualization:

- **Combo Box**  
A standard user-interface component that drops down a vertical list of items when it is clicked. Users can then select an item from the list.
- **List Box**  
A standard user-interface component that lets users select items from a vertical list.
- **Label Based Menu**  
The component lets users to select items from a vertical or horizontal list.
- **Radio Button**  
The component lets users select from a vertical or horizontal group of items.
- **Fish-Eye Picture Menu**  
With the fish-eye picture menu, users select from a set of pictures or icons. As the mouse is moved over each item in the menu, the item is magnified. The closer the mouse is to the center of the item, the more the item is magnified. This creates an effect similar to that of a fish-eye lens.
- **Sliding Picture Menu**  
With the sliding picture menu, users select from a set of icons or pictures. The users can use arrows to scroll through the icons or the menu can be configured to scroll through the items as the user moves the mouse. With each selection that is made, data corresponding to that selection is inserted into a range in the spreadsheet. All of the menu components are used to provide navigation for your visualization.
- **Table and List View**  
The table component is a What You See Is What You Get representation of any group of cells from your Excel file. Each row allows multiple selections. The list view component has the same functionality as the table component, but lets the user sort the columns and adjust the width of the columns in the exported SWF file.  
**Note:** The table component can be used as a display component as well as a selector component. As a display component, the table is a graphic representation of a range of cells in the spreadsheet. Click the Display Data cell selector button and select a range of cells from the spreadsheet. To use the table as a selector component, after setting the Display Data range, set the Insert Option to rows.

- **Check Box**

A standard user-interface component where users toggle between two states: checked and unchecked.

**Note:** When using the check Box component you must specify settings to control the movement between the checked and unchecked states. Click the Source Data Browse button and set the values that will control whether the check Box component appears checked or unchecked. Click the Insert In cell selector button and select an empty cell that will display the value that reflect whether the check box is checked or unchecked.
- **Icon**

The icon can be used as a mobile selector or object. It can represent the value contained in one cell and be compared to its target or budget value. The Icon changes color depending on its value. See [“Alerts” on page 69](#) for more information. At the same time, you can use the Icon to activate and display other components. See [“Dynamic Visibility functionality” on page 66](#) for more information.

**Note:** When using the Icon component you must specify settings to control the movement between the checked and unchecked states. Click the Source Data Browse button and set the values that will control whether the Icon component appears checked or unchecked. Click the Insert In cell selector button and select an empty cell that will display the value that reflect whether the Icon component is checked or unchecked.
- **Toggle Button**

A standard user-interface component that lets users toggle between two states: on and off.
- **Filter**

The filter component takes a range of data that shares a common number of items and filters the content so that there are no duplicated records.
- **Accordion Menu**

The accordion menu is a two-level menu that lets users first select a category and then select from items within that particular category.
- **Source Data Component**

A component that has no visual interface. Users can push data into other cells by changing the value of the component's Selected Index.
- **Play Selector**

The play selector sequentially inserts one row or column from a defined range into the Insert In cells you defined. You can link the Insert In cells to a chart so that the chart data changes each time the play selector inserts



a row or column. The play selector component can display a large amount of data with a movie effect which lets users view the data without clicking on each selection.



**Note:** The Information button that appears on the Properties panel of each selector component displays an animation that describes the functionality of the selector component.

## Sample visualization: filter component

The filter component is a selector that can present a large amount of data. The filter component can be used to create a visualization with drill down navigation that can use two or more interrelated combo boxes.

The filter component takes a range of data that shares a common number of items and filters the content so that there are no duplicated records. When a selection is made on the filter component, the corresponding data is inserted in the Insert In cells you specified. The Insert In cells can be used as source data for a chart component.

You can, for example, use the filter component to display the Sales per Sales Representative for a group of products that is organized by New Customers and Existing Customers.

**Note:** You can find the spreadsheet, sample XLF file, and sample SWF file for this visualization in the following location:

C:\Program Files\Business Objects\Crystal Xcelsius Designer  
4.5\samples\User Guide Samples

### ► To create an Xcelsius visualization with a filter component and a chart component

1. Import the Excel spreadsheet into Xcelsius.

For information on importing spreadsheets into Xcelsius, see [“Using the Import Model button” on page 25](#).

2. Place a filter component at the top of the canvas.
3. Double-click the filter component to open the Properties panel.

4. Click the **Source Data** cell selector button and select all the data to be included in the visualization.

For this example, the range of cells should include the data to be filtered by as well as the data to be filtered.

5. Click the **Insert In** cell selector button and select an empty row of cells.

For this example, the range of cells must be empty as the data corresponding to the selections made on the Filter component will be inserted in the range of cells.

6. Adjust the value in the **Number of Filters** box.  
For this example, set three filters: Product, Sales Representative, and Account Type.
7. Click the **Title** cell selector button and select the cell containing the title of the visualization.
8. Close the Properties panel.
9. Place a bar chart component on the canvas below the filter component.  
For information on configuring the bar chart component, see [“Using chart components” on page 40](#).

## Sample visualization: accordion menu component

The accordion menu is a two-level menu that lets users first select a category and then select from items within the category.

When a category is selected, the category name is inserted into the Insert Category In cell you defined. The selected category is expanded to display the list of items specific to that category; the other categories are collapsed. When an item is selected within a category, the corresponding Source Data is inserted into the Insert Item In cell you defined.

When the list of categories or the list of items within one category becomes larger than the space available, a scroll bar is automatically added to let users scroll through all of the available items.

You can, for example create a visualization that shows sales data for all the Sales Representatives of a company organized by region.

**Note:** You can find the spreadsheet, sample XLF file, and sample SWF file for this visualization in the following location:

C:\Program Files\Business Objects\Crystal Xcelsius Designer  
4.5\samples\User Guide Samples

### ► To create an Xcelsius visualization with an accordion menu component and a chart component

1. Import the Excel spreadsheet into Xcelsius.  
For information on importing spreadsheets into Xcelsius, see [“Using the Import Model button” on page 25](#).
2. Place an accordion menu component on the left side of the canvas.
3. Place a column chart component on the right side of the canvas.
4. Double-click the accordion menu component to open the Properties panel.

5. Click **Add** to add a category.  
For this example, you will create a category for each region.
6. Click the **Name** cell selector button and select the first region name.  
**Note:** You can also type the region name in the Name box.
7. Click the **Items** cell selector button and select the items to be listed under that particular category.  
For this example, the range of cells should contain the names or identification numbers of the sales representatives within the selected region.
8. Click the **Source Data** cell selector button and select the data corresponding to the items in the category.  
For this example, the range of cells should contain the sales data for the sales representatives in the selected region.
9. Repeat steps 5-8 for each region.
10. Click the **Insert Item In** cell selector button and select an empty range of cells.  
For this example, the range of cells must be empty so that the data for the selected category can be inserted in the range of cells. The range of cells must be large enough to contain the inserted data.
11. Close the Properties panel.
12. Double-click the column chart component to open the Properties panel.
13. Click the **Data Range** cell selector button and select an empty row of cells.  
For this example, the range of cells must be empty so that the data corresponding to the selections made on the accordion menu component can be inserted in the range.
14. Click the **Chart Title** cell selector button and select an empty cell in the item column.  
This cell displays the name or identification number of the sales representative whose data is being shown.
15. Click **Preview**.  
As you click on the different sales representatives from each region, the chart will display the monthly sales data for that particular sales representative.

## Sample visualization: Sliding Picture menu component

The sliding picture menu is a menu where users can select from a set of icons or pictures. The users can use arrows to scroll through the icons or the menu can be configured to scroll through the items as the user moves the mouse. With each selection that is made, data corresponding to that selection is inserted into a range in the spreadsheet.

You can, for example create a visualization that lets the user select from a list of products to see the yearly sales data for that product. The sliding picture menu contains a set of thumbnail images that the user can scroll through. When the user selects an image from the sliding picture menu the sales data for that product is displayed in a column chart.

**Note:** You can find the spreadsheet, sample XLF file, and sample SWF file for this visualization in the following location:

C:\Program Files\Business Objects\Crystal Xcelsius Designer  
4.5\samples\User Guide Samples

### ► To create an Xcelsius visualization with a sliding picture menu component and a chart component

1. Import the Excel spreadsheet into Xcelsius.

For information on importing spreadsheets into Xcelsius, see [“Using the Import Model button” on page 25](#).

The Excel file contains the list of images that the sliding picture menu will display as thumbnails for the user to click on.

2. Place a sliding picture menu component on the top of the canvas.
3. Place a column chart on the canvas beneath the sliding picture menu component.
4. Double-click the sliding picture menu component to open the Properties panel.
5. Click the **Labels** cell selector button and select the cells containing the data to be displayed as labels on the sliding picture menu component.  
For this example, select the list of products.
6. Click **URL** to enable the **URL** cell selector button.
7. Click the **URL** cell selector button and select the range of cells containing the image files from the imported spreadsheet.

Selecting the image files tells the sliding picture menu to load the thumbnail images from a folder called images that will be in the same location as the exported SWF file.

8. On the **Insert Option** list, click a behavior type.  
For this example, click rows so that a row of data is inserted when the user selects an item. This row of data will be the source data for the column chart.
  9. Click the **Source Data** cell selector button and select the range of cells containing the data to be inserted into the Insert In cells when a selection is made on the sliding picture menu component.  
For this example, the range of cells should contain the yearly sales data for the products.  
**Note:** The Source Data box is not available with all behavior options on the Insert Option list.
  10. Click the **Insert In** cell selector button and select an empty row of cells.  
For this example, the range of cells must be empty so that the data corresponding to the selection made on the sliding picture menu component can be inserted in the range of cells.
  11. Close the Properties panel.
  12. Double-click the column chart component to open the Properties panel.
  13. Click the **Data Range** cell selector button and select the row of cells you selected as the Insert In range of the sliding picture menu component other than the cell in the label column.  
For this example, the range of cells should contain the yearly sales data for the currently selected item in the sliding picture menu.
  14. Configure the column chart component.  
For information on configuring chart components, see [“Using chart components” on page 40](#).
- Note:** When you export the visualization, be sure to export your SWF file to the directory that contains the images folder so that the thumbnail images load properly.

## Using the map component

Map components create visualizations with geographical representations that can be displayed by region.

The map component has two major characteristics. It shows data for each region; each region can also act as a Selector. By combining these two features, you can create a visualization where the data for each region appears when you

pass the pointer over the region. At the same time, each region can insert a row of data that contains additional information. This row of data is displayed on other components, such as a chart or a set of single value components.

## How does it work?

Xcelsius associates data with each region in the map by using region codes. Each region in the map has a defined region code. When Source Data, Display Data, or Target Data is selected, the map component searches either the first column or first row of the range for the defined codes. When a code is found, the data in the matching row or column is then associated with the corresponding region.

By default, the USA map uses the postal abbreviations as its region codes, and the Europe map uses the ISO, or International Organization for Standardization, two-digit country codes for its region codes. To use the map components with existing spreadsheets, you can edit the region codes associated with each region by editing the region names.

**Note:** In the Excel file you must identify the state code and data in an adjacent range of cells for each type of selection: Display Data, Source Data, and Inset In Range.

## Sample visualization: map component

For example, you can create a visualization that shows the revenues by state for a retail company, where when a user clicks or passes the pointer over a state, the state inserts a row of data that populates a column chart showing the historic revenue trend.

**Note:** You can find the spreadsheet, sample XLF file, and sample SWF file for this visualization in the following location:

```
C:\Program Files\Business Objects\Crystal Xcelsius Designer  
4.5\samples\User Guide Samples
```

### ► To create an Xcelsius visualization with a map component and a chart component

1. Import the Excel spreadsheet into Xcelsius.  
For information on importing spreadsheets into Xcelsius, see [“Using the Import Model button” on page 25](#).
2. Place a map component on the canvas.
3. Click the **Region Names** cell selector button.

By default, the USA map has the list of the 48 continental states plus Washington D.C. in alphabetical order. Before using the map, you must

indicate the codes to which each state is going to be identified on the Excel file. For example, you can choose AL for Alabama and CA for California. The USA map identifies the data corresponding to a cell that contains the code AL as being the data for Alabama and the cell that contains CA as being the data for California.

4. Click the **Region Names** Browse button to verify that each state is linked to the correct state code.
5. Click the **Display Data** cell selector button and select the cells containing the State Codes and the state data from the imported spreadsheet.
6. Click the **Source Data** cell selector button and select the cells containing the State Codes and the state data from the imported spreadsheet.  
This step configures the map component to act as a selector.
7. Click the **Insert In** cell selector button and select an empty range of cells.  
For this example, the range of cells must be empty as the range of data for the state selected on the map component will be inserted into the range of cells.
8. Place a column chart component on the canvas above the map component.
9. Click the **Data Range** cell selector button and select the range of cells you selected for the Insert In range of the map component from the imported spreadsheet.

This ensures that the column chart component displays the data of the state that is selected on the map component.

10. Configure the column chart component.

For information on configuring chart components, see [“Using chart components” on page 40](#).

## Using the art and background components

Art and backgrounds can be used to enhance your visualizations. The background components can be used to import images or Flash movies into your Xcelsius visualization.

Art and background components can be used to customize visualizations:

- Image Component

The image component can be used to display JPG images, which lets you add your own logos or artwork into an Xcelsius visualization. You can also add videos, animations, and other interactive elements by importing a Flash movie.

- **Ellipse**  
An ellipse that you can add to your visualizations.
- **Background**  
Backgrounds are prebuilt artwork that you can add to your visualizations to assist layout and improve design. Backgrounds can be used to create divisions and designate groups of related components. Backgrounds maintain their effects and visual integrity at virtually any size.
- **Line**  
A vertical or horizontal line you can use to define your visualizations.
- **Rectangle**  
A rectangle that you can add to your visualizations to outline, define, or contain sections.

## Skins

Each skin has a number of different backgrounds that you can use that maintains the look and feel of that particular skin. Combined with the appearance options of the backgrounds, you can create a multitude of different looks using the background components. With Skins you can globally change the appearance of components.

To select skins, on the View menu, click Change Skin. The following options appear on the Skins dialog box:

- **Select Skins**  
Select the skin name from the list.
- **Reset to Skin Defaults**  
Select this option to revert any changes you have made to components to the default values for the selected skin. Clear this option to retain the changes you have made to the components.

## How to use the image component

Use the image component to display JPG images. This lets you to add your own logos or artwork to an Xcelsius visualization.

**Note:** Progressive JPGs and JPGs with CMYK coloring, as opposed to the standard RGB coloring, are not supported.

You can also add videos, animations, and other interactive elements by importing a Flash movie. As exported Xcelsius visualizations are Flash



movies, you can use this feature to add an exported Xcelsius visualization into another Xcelsius visualization.

**Note:** Flash Player versions 7 or greater have new security features which may prevent your Xcelsius 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 a HTTPS location. Please refer to the online article from Macromedia regarding security restrictions for data loading for information on creating a policy file to allow access to data in the cases above.

## Embedding external files

When importing external files into the image components, you will have the choice of embedding the file. If you choose to embed the file, it will become a part of the SWF file that is created when the visualization is exported.

If you choose not to embed the file, at runtime the file will be loaded into the exported visualization as needed. When the visualization is exported, all of the non-embedded external files used in the visualization are written out to a folder with the same name and location as the exported visualization. The visualization will load the external images or movies from this directory. The visualization and folder must exist in the same directory for the external files to be loaded correctly. The decision to embed the file will depend on your specific needs.

The main advantages for embedding files are as follows:

- Embedded files let you distribute your entire visualization in a single file.
- Dynamic Visibility is faster as reloading is not necessary.
- Embedded files maintain their state when hidden with Dynamic Visibility.

The main advantages for not embedding files are as follows:

- Possible runtime performance increases since the external files are unloaded when they are hidden with Dynamic Visibility.
- Shorter load times for the application since external files are loaded only when necessary.
- The visualization does not need to be re-exported if external file changes.

Regardless of which option you choose, Xcelsius stores a local copy of the file internally in the XLF file. The original file is no longer accessed or used in the visualization. The XLF file can be moved or emailed and the contents of the file will travel with it.

In certain cases, you may not want to use local copies of images, but rather load an image from a specified URL at runtime.

## Nested external files

Xcelsius lets you use external SWF files in your visualizations. These SWF files may, in turn, have external assets such as other SWF files, images, or XML files. The external assets used by the SWF that are referenced with relative paths must be available from the location of the host visualization.

For example, if you have a SWF file which loads in an external image at `images/myImage.gif`, and you use this SWF file within your visualization, the SWF file will attempt to load an image at `images/myImage.gif` from the location of the visualization. It does not load relative to the external SWF file.

You can, for example, add your corporate logo into your Xcelsius visualization.

### ► To create an Xcelsius visualization with an image component

1. Place an image component on the canvas.
2. Double-click the image component to open the Properties panel.
3. Click **Import**.
4. Navigate to and select the JPG or SWF file.
5. Click **Open**.

Your logo is imported into the visualization at the default size. You can now place and resize the image.

## Using the other components

This category contains an assorted set of components that you can use to enhance your visualizations:

- Trend Icon

The trend icon changes its pointing direction, depending on the value of the cell to which it is linked:

- If the value is positive, the arrow points up.
- If the value is zero, the arrow is neutral.
- If the value is negative, the arrow points down.

- Interactive Calendar

The interactive calendar component is a selector that lets you incorporate date selection into your visualizations.

- **Local Scenario Buttons**  
Lets users save states of an Xcelsius visualization to their local machines. Afterwards, these states or scenarios can be loaded quickly, even after closing the visualization. These scenarios are saved to the local machine, and will be unavailable if the visualization is opened on a different machine.
- **Grid**  
A dynamic table that represents a group of rows and columns to display the content. The Grid lets you show the data just as it is on any table, or preform data modification that can impact other components.
- **Panel Set**  
The Panel Set component is a series of framing options that enables you to easily navigate between files in a presentation. You can embed Jpegs or SWF files into the frames of the Panel Set component and adjust a variety of formatting features to customize the look of the component in your visualization.

## Sample visualization: interactive calendar component

The interactive calendar component is a selector that lets you incorporate date selection into your visualizations. The interactive calendar component lets you browse by year, month, and day. The interactive calendar has two date selection modes. The open-ended mode lets you scroll through any year and month. You can also limit the range of dates that the user can scroll through by setting a minimum and maximum value for the year and month. The interactive calendar has two Insert Options: Date and Day. The Date function inserts the selected date into a cell. The value that is inserted is formatted in the Excel universal date format. The Day function inserts the numeric value for the selected date.

You can, for example create a visualization that shows different branches and the daily sales for a given month. You want to display the daily sales data for all the branches in a chart. The interactive calendar component uses the Insert Data function to insert a date value into a cell that is used by VLookup functions to populate a range of data for the chart. With each date selection, the range that the chart is linked to will change to show the branch sales data for the selected date.

**Note:** You can find the spreadsheet, sample XLF file, and sample SWF file for this visualization in the following location:

C:\Program Files\Business Objects\Crystal Xcelsius Designer  
4.5\samples\User Guide Samples

► **To create an Xcelsius visualization with an interactive calendar component and a chart component**

1. Import the Excel spreadsheet into Xcelsius.  
For information on importing spreadsheets into Xcelsius, see [“Using the Import Model button” on page 25](#).
2. Place an interactive calendar component at the top of the canvas.
3. Place a bar chart component on the canvas below the interactive calendar component.
4. Double-click the interactive calendar component to open the Properties panel.
5. Click the **Insert In** cell selector button and select an empty cell from the imported spreadsheet.  
The Insert In cell must be empty or the functionality of the interactive calendar component will be compromised.  
When a date is selected, the value is inserted into the cell linked to the Chart Subtitle field. The VLookup functions in the chart component data cells uses this date to find the corresponding data in the Daily Sales by Branch table.
6. On the **Behavior** tab, set the default. date for the interactive calendar component.  
**Note:** You can set the default date by typing in the Default Month, Default Year, and Default Day boxes, or clicking on the adjacent cell selector buttons and selecting the dates from the imported spreadsheet.
7. Set the date range for the interactive calendar component.  
**Note:** You can set the date range by typing in the Start Month, Start Year, End Month, and End Year boxes, or by clicking the adjacent cell selector buttons and selecting the dates from the imported spreadsheet.
8. Close the Properties panel.
9. Double-click the bar chart component to open the Properties panel.
10. Click the **Data Range** cell selector button and select the source data from the imported spreadsheet.
11. Type in the **Chart Title** box or click the adjacent cell selector button and select the title from the imported spreadsheet.
12. Type in the **Chart Subtitle** box or click the adjacent cell selector button and select the subtitle from the imported spreadsheet.
13. Click **Preview**.

As you click on the dates in the Interactive Calendar component, the chart component will display the daily sales data for all of the branches for that date.

## Local scenario buttons component

The local scenario buttons component lets users save the current state of a visualization, making it well-suited for saving results of what-if analyses. Users can save any number of these results or scenarios and load them at any time, even after closing the visualization.

The scenarios created are specific to each visualization. As such, two visualizations can have scenarios with the same names without interfering with one another.

The visualization can be moved or renamed on the same computer and will still be able to access its saved scenarios.

Scenarios saved in preview mode will not persist outside of the preview session. This includes snapshots and exporting to PowerPoint or to Outlook.

**Note:** Local scenarios created on one computer will not be accessible to the visualization if it has been emailed or moved to another computer

### How does the local scenario buttons component work?

To enable users to save, load, and delete scenarios, add a local scenario button component to the visualization.

When running the visualization, users click the local scenario button component for the options for the scenarios: Save, Load, and Delete.

After one of the three options is chosen, a dialog box appears, allowing the user to complete the operation.

### Flash Player settings

An unlimited number of scenarios can be saved in every visualization, so long as enough local storage is allocated for the Flash Player. If a user attempts to save a scenario and there is not enough local storage, the Flash Player will prompt the user to allocate more. If more space is allocated, the scenario will be saved successfully. If not, the scenario will not be saved.

If a user attempts to save a scenario and local storage has been disabled, the local scenario buttons component will ask the user to enable local storage and automatically open the Flash Player settings. The scenario will not be saved until the user enables local storage and then saves the scenario.

The Flash Player settings can be opened by right-clicking anywhere on the visualization.

**Note:** Setting the Local Storage amount of the Flash Player below what is currently used, or disabling local storage by checking the Never box will erase all saved scenarios on the computer. This includes scenarios created in other visualizations. The Flash Player will warn the user before allowing the scenarios to be erased.

Loading a saved scenario should restore the visualization to almost the same state it was in when it was saved. There are a few exceptions, primarily cosmetic changes, which don't directly affect the data visualization. The states of external SWF files are also not restored when a scenario is loaded.

## Sample visualization: grid component

In some visualizations, you might want to complement the graphical display of data with traditional tables that show the underlying data. One way to do this is by using a Value component. For instances where you would need multiple value components, you can also use the grid component.

The grid component is a collection of N number of value components that are linked together so that they respond to global functions. For example, if you change the font size, the same font size will be applied to all cells or values in the grid component.

The grid component works in the same way as the value component. For information on value components, see [“Using the Selector components” on page 46](#).

The grid component can be used as an input or output component. You can modify the underlying data by placing the pointer over each one of the array values in the grid.

You can, for example complement a visualization displaying the Sales by Branch for a company by placing a grid component that displays the data that underlies the chart component.

**Note:** You can find the spreadsheet, sample XLF file, and sample SWF file for this visualization in the following location:

C:\Program Files\Business Objects\Crystal Xcelsius Designer  
4.5\samples\User Guide Samples

### ► To add a grid component to an Xcelsius visualization

1. Place a grid component on the canvas.
2. Double-click the grid component to open the Properties panel.

3. Click the **Link to Cell** cell selector button and select the Insert In row of the visualization and the row containing the x axis values of the chart component.

For this example, the range of cells should contain the year names.

A visualization with a chart component and a grid component shows users both the graphical and punctual data representations. As the user selects each branch, both the chart and the grid display the corresponding data.

## Using the text components

This category contains a set of components for labeling components and entering text in your visualization. The values displayed in the text components are static and will not change as the visualization is updated.

Text components let you customize your visualization:

- **Input Text**  
The input text component lets users input values into the visualization by typing.
- **Input Text Area**  
The input text area, similar to the input text component, lets users input text into the visualization. The input text area, however, lets users type multiple lines of text.
- **Label**  
The label component lets you add an unlimited amount of text to enhance your visualizations. You can use the label component to create titles, subtitles, explanations, help, and more.  
**Note:** The link between the label component and the imported spreadsheet is dynamic. For information on dynamic and static data sources, see [“Dynamic and static data sources” on page 30](#).

## Using the Web connectivity components

This category contains a group of components that provides options for linking your visualizations to the Web:

- **External Slideshow**  
An External Slide Show component creates a slide show of URL-based images and SWF files.

Unlike the normal Image Component, which requires that you first Import the file, the External Slide Show component loads the image at the URL specified in the URL data source.

**Note:**

- When an image is imported into normal Image Components, Xcelsius stores its own local copy of the file internally in the XLF file. The original file is no longer accessed or used in the visualization. Because the file data is stored within the XLF, the XLF can be moved or emailed and the contents of the file travels with it. The External Slide Show points to a URL, however, which can change at runtime. This means that the image does not travel with the XLF. Therefore the image must be available to the SWF at runtime.
- Whenever the External Slide Show URL changes, it attempts to load in the image at that location. Once it has loaded the image, it will transition from the current image to the new one specified at the URL data source.
- URL Link Button  
A button that links to a relative or absolute URL when pressed.





# Using Advanced Features



# 4

chapter



## Overview

This chapter provides an introduction to the functionality that can be used to customize Crystal Xcelsius visualizations.

## Dynamic Visibility functionality

For information on the specific dynamic visibility options, see [“Dynamic Visibility” on page 95](#).

You can combine two components with dynamic visibility. For example, you can add a Toggle Button to display a specific chart. The Toggle Button can be configured to toggle between inserting showChart and hideChart into a cell when it is selected. By linking the chart to this destination cell and setting the Chart's Display Status Key to showChart, the Chart becomes visible when the Toggle Button inserts the value showChart and hidden when the Toggle Button inserts hideChart.

You may want to switch between a number of components. To accomplish this, use the Display Status Key and a Selector. For example, a visualization might need to toggle between different charts. To achieve this, give each chart a unique Display Status Key, such as chart1 or chart2. A list box with Source Data that matches the Display Status Keys can then insert into a cell the Display Status of every chart that is linked to the list box. As the list box value is inserted into the cell, the corresponding chart is made visible, while the others are hidden.

## Sample visualization: Dynamic Visibility

► **To create an Xcelsius visualization using dynamic visibility with a check box component and a chart component**

1. Import the Excel spreadsheet into Xcelsius.  
For information on importing spreadsheets into Xcelsius, see [“Using the Import Model button” on page 25](#).
2. Place a check box component at the top of the canvas.
3. Place a column chart component on the canvas beneath the check box component.
4. Double-click the check box component to open the **Properties** panel.
5. Click the **Source Data** Browse button and set the values to control whether the check box component is checked, and click **OK**.

For this example, you can use the default values of 0 and 1.

6. Click the **Insert In** cell selector button and select an empty cell from the imported spreadsheet.  
The cell must be empty for the dynamic visibility functionality to work.
7. Close the **Properties** panel.
8. Double-click the column chart component to open the **Properties** panel.
9. Configure the column chart component.  
For information on configuring chart components, see [“Using chart components” on page 40](#).
10. On the Behavior tab, click the **Display Status** cell selector button and select the Insert In cell you specified for the check box component.  
By default, when you run the visualization, the chart won't be visible. Users must click on the Check Box to enable the chart.

## Sample visualization: Status List and Display Status

For information on the Status List option on the Insert Option list, see [“Insert Data” on page 148](#).

For information on Display Status functionality, see [“Dynamic Visibility” on page 95](#).

You can, for example create a visualization that shows the revenues by region that has different charts displaying the data for each region.

### ► To create an Xcelsius visualization using dynamic visibility with a radio button component and multiple chart components

1. Import the Excel spreadsheet into Xcelsius.  
For information on importing spreadsheets into Xcelsius, see [“Using the Import Model button” on page 25](#).
2. Place a radio button component on the left side of the canvas.
3. Double-click the radio button component to open the **Properties** panel.
4. Click the **Labels** cell selector button and select the cells containing the radio button selections from the imported spreadsheet.  
For this example, the range of cells should contain the region names.
5. On the **Insert Option** list, click **Status List**.
6. Click the **Insert In** cell selector button and select an empty range of cells.  
The range of cells must correspond to the range of selections. For this example, the range of cells must correspond to the region names.

7. Close the **Properties** panel.
8. Place a pie chart component beside the radio button component on the canvas.
9. Configure the pie chart component to display the data for the North America region.  
For information on configuring chart components, see [“Using chart components” on page 40](#).
10. Place a line chart component beside the radio button component on the canvas.
11. Configure the line chart component to display the data for the Latin America region.
12. Place a column chart component beside the radio button component on the canvas.
13. Configure the column chart component to display the data for the Europe region.
14. Place a bar chart component beside the radio button component on the canvas.
15. Configure the bar chart component to display the data for the Asia region.
16. Place a pie chart component beside the radio button component on the canvas.
17. Configure the pie chart component to display the data for the Australia and Pacific region.
18. Open the **Properties** panel of the North America pie chart component.
19. On the **Behavior** tab, click the **Display Status** cell selector button and select the Status List cell for North America you specified for the radio button component.
20. Close the **Properties** panel.
21. Repeat steps 18-20 for the other region charts.
22. Click **Preview**.

When a selection is made on the radio button component the number 1 is inserted in the Status List cell corresponding to the selection, all other Status List cells display the value zero. When a Display Status cell has the value 1 in it, all components linked to that cell are visible, the result is that you will see only the chart that corresponds to the radio button selection is displayed.

Each region selected on the Radio Button will show a different type of chart.

# Alerts

For information on the specific Alerts options, see [“Common Alerts Tab features” on page 101](#).

## Sample visualization: single value using alerts

You can, for example create a visualization that shows the actual balances compared to the target for month to date Revenues, Inventory, and the Cost of Good Sold.

► **To create an Xcelsius visualization using alerts with gauge components**

1. Import the Excel spreadsheet into Xcelsius.

For information on importing spreadsheets, see [“Using the Import Model button” on page 25](#).

2. Place a gauge component on the right of the canvas.
3. Double-click the gauge component to open the **Properties** panel.
4. Click the **Title** cell selector button and select the cell containing the title for the gauge component.

For this example, the title for the gauge component is Sales.

5. Click the **Link to Cell** cell selector button and select the cell containing the Actual Value for Sales from the imported spreadsheet.
6. On the **Alerts** tab, click **Enable Alerts**.
7. Click **Percent Alerts**.
8. Click an Alert Definition.
9. Customize the percentage limits.
10. Customize the alert colors.
11. Click the **Target** cell selector button and select the Target value for Sales from the imported spreadsheet.
12. Click **Enable Object Alerts**.

This option changes the gauge pointer color to reflect the alert level of the pointer position.

13. Click **Enable Alert Level Display**.

This option adds the alert color spectrum to the gauge component.

14. On the **Behavior** tab, adjust the initial limits for the gauge component as needed.  
For this example, set the upper limit to 500, and the lower limit to 99.
15. Close the **Properties** panel.
16. Copy the gauge component and paste two copies beside the original on the canvas.
17. Double-click the second gauge component to open the **Properties** panel.
18. Customize the gauge component to display Inventory data.  
Set the Alert Definition to Middle Values are Good.
19. Close the **Properties** panel.
20. Double-click the third gauge component to open the **Properties** panel.
21. Customize the gauge component to display the Cost of Good Sold data.  
Set the Alert Definition to Low Values are Good.
22. Close the **Properties** panel.
23. Click **Preview**.

## Creating templates

This section describes Xcelsius Templates. Xcelsius offers a set of templates you can use to create a new visualization. You can use the existing Xcelsius templates, or you can create a visualization from scratch and save it as a template.

To open a template, on the File menu, click New From Template. A list of available libraries is available. Each library contains a group of templates that are displayed under the Items section. As you select each template in the list, a preview of the template is shown on the right side of the screen. These are interactive templates. You can click on them to see the intended functionality of the components. Select a template from the list and click OK.

When selected, the template is inserted on the canvas as a new visualization. You can now add, delete or modify the template, and save it as a new visualization or as a modified or new template.

## Custom-made libraries and templates

You can create your own libraries and templates. For example, if you are creating a set of Portlets for use in your corporate portal, you may want to save your visualizations as templates so that you can re-use them when updates are necessary. You can create multiple libraries and templates.

► **To create a new template**

1. Create the Xcelsius visualization you want to save as a template.
2. On the **File** menu, click **Save As**.  
The Save As dialog box appears.
3. Navigate to the folder of the library where you want to save the template.  
**Note:** To create a new library, create a new folder under the /template directory of the Xcelsius installation.
4. Enter a file name for the XLF file, and click **Save**.  
The file name becomes the name of the new template.
5. On the **File** menu, point to **Export**, and click **Macromedia Flash (SWF)**.
6. Navigate to the folder where you saved the XLF template.
7. Enter the same file name for the SWF file that you entered for the XLF file, and click **Save** to export the visualization.

Exporting the visualization creates the template preview that will be displayed in the Preview section of the Templates window.

The visualization is now available as a template. The next time you open the templates window, your template will be available for preview and use.

If you create a visualization you think would make a good template, you can email it to us at [CrystalXcelsiusupport@businessobjects.com](mailto:CrystalXcelsiusupport@businessobjects.com).

## Using Global Styles

Global Styles alter the appearance of your visualization. You can customize your entire visualization, or only certain components. Global Styles affect components hierarchically. That is the primary colors you specify affect the components before the secondary colors. Global Styles are divided into application categories: Styles, Text and Labels, and Buttons and Background. You can create your own Global Style based on modifications you have made to an existing Global Style or combination of Global Styles. Global Style modifications do not affect fonts, text formatting, or alerts, only the color of the visualization.

**Note:** Global Styles are not transferred with XLF files. If the Global Style 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 Global Style

To change the current Global Style, on the View menu, click Change Style. The Global Styles dialog box appears. Before you change the style, the Default style is applied to your visualization. The Default style is a special Global Style. The style parameters are taken from the skin, and you cannot modify them. The Default style can be used to revert to the original appearance of a visualization.

In the Global Styles dialog box, select a Global Style from the Current Style list. Click Apply to apply the selected Global Style to the components on the canvas. Click OK to apply the selected Global Style to components that will be placed on the canvas. The Global Style that is applied to the visualization, is displayed on the Component Explorer.

## Creating a Global Style

A Global Style is created when you modify the style parameters of your visualization and save it as a style.

**Note:** When creating a Global Style, define a set of custom colors. Normally five custom colors is sufficient. Before you begin assigning colors to your components, add these colors to the custom color palette. To access the color palette, click on any custom color selector button. For information on the color selector button, see [“Color Selector button” on page 100](#).

### ► To create a global style

1. Create an Xcelsius visualization.
2. On the **View** menu, click **Change Style**.  
The Global Styles dialog box appears.
3. On the **Current Style** list, select a global style to be modified.
4. Click **Save As**.  
The Save Crystal Xcelsius Style dialog box appears.
5. Enter a name for the new style and click **Save**.
6. In the **Borders and Lines** area, click the **Primary Color** color selector button and select a new primary color.  
For this example, select orange.

**Note:** In the Current Style list the style has been labeled as modified, this will be updated when you save the style.



7. Modify the other colors of the new style.
8. Click **Save As** and replace the style.
9. Click **Apply**.

The new style is applied to the components on the canvas.

10. Click **OK**.

The new style is applied to any components that will be added to the visualization.

**Note:** When you close Xcelsius the Global style is not attached to the visualization. You will need to re-apply or select the Global Style to continue working with it.

## Transferring Global Styles

Global Styles are not transferred with XLF files. To make a Global Style created on one machine available to another, you must transfer the file containing the style information. For every style you create, an XGS file is created with the same name as the style. The XGS file stores all the style information. By default, these files are saved to the `/styles` directory of the Xcelsius installation.

To copy a Global Style from one machine to another, simply the corresponding XGS file from the source machine onto the other machine. If the file is placed in the `/styles` directory of the Xcelsius installation of the other machine, the new Global Style will automatically appear in the Current Style list on the Global Styles dialog box. You can manually import the style by clicking browse on the Current Style list, navigating to the XGS file and clicking Save.





# Exporting Crystal Xcelsius Visualizations



5

chapter



## Overview

This chapter provides information on exporting your Crystal Xcelsius visualization.

## Exporting your visualization to Flash

Once your visualization is complete, you can export your content as a Macromedia Flash (SWF) file. The SWF file can be executed locally with the standalone Flash player, opened in a browser, used as part of a web site, or imported into a number of different programs.

► **To export an Xcelsius visualization to Flash**

1. Create an Xcelsius visualization.
2. On the **File** menu, point to **Export**, and click **Macromedia Flash (SWF)**.  
The Export Macromedia Flash (SWF) dialog box appears.
3. Enter a name for the SWF file, and click **Save**.

Xcelsius generates the Macromedia Flash file.

**Note:** If there are any non-embedded external files in the visualization, a folder containing those files is also generated with the same name and location as the exported file. The visualization loads the external files from this directory at runtime. The visualization and folder must exist in the same directory for the external files to be loaded correctly.

## Exporting your visualization to HTML

Not all computers are configured to open Flash files in the browser. By embedding your SWF visualization in an HTML file, your users can view the visualization through an HTML file, by double-clicking one file. The generated HTML document references your SWF visualization.

► **To export an Xcelsius visualization to HTML**

1. Create an Xcelsius visualization.
2. On the **File** menu, point to **Export**, and click **HTML**.  
The Publish to HTML dialog box appears.
3. Enter a name for the HTML file, and click **Save**.

Xcelsius generates the HTML file and a SWF file in the same directory with the same name. These files must be kept together in order for the HTML file to work properly.

## Exporting your visualization to PowerPoint

Once your visualization is complete, you can export it as a PowerPoint slide. You can modify the slide using Microsoft PowerPoint.



You can preview your visualization as a PowerPoint slide. Click the Send to Powerpoint button on the toolbar. PowerPoint is launched your visualization is inserted in a slide. The visualization in the slide is dynamic and interactive. You can save the preview presentation as a PowerPoint presentation.

**Note:** External files that are referenced relatively by the visualization will not be available in the preview presentation.

### ► To export an Xcelsius visualization to PowerPoint

1. Create an Xcelsius visualization.
2. On the **File** menu, point to **Export**, and click **PowerPoint Slide**.  
The Export Powerpoint (PPT) dialog box appears.
3. Enter a name for the PPT file, and click **Save**.

Xcelsius generates the PowerPoint (PPT) file and a SWF file with the same name. The generated PowerPoint file is automatically opened and the visualization will be visible on the first slide of the presentation. When the presentation is run, the visualization is dynamic and interactive.

**Note:** When the visualization is exported, any external files used by External components are created and placed in a folder with the same name and location as the exported visualization. The external files must remain in the same folder as the visualization for the visualization to work properly.

## Exporting your visualization to Adobe PDF

Once your visualization is complete, you can export your content as an Adobe® Portable Document Format (PDF) file. The PDF file can be viewed locally, opened in a browser, or deployed on a web site. The visualization is embedded in the PDF and is dynamic and interactive.



You can preview your visualization as a PDF. Click the Send to Adobe Acrobat PDF button on the toolbar. Adobe Acrobat is launched and your visualization is displayed on the first page. The visualization in the PDF is dynamic and interactive. You can save the preview presentation as a PDF.

► **To export an Xcelsius visualization to Adobe PDF**

1. Create an Xcelsius visualization.
2. On the **File** menu, point to **Export**, and click **Adobe PDF**.

The Export Adobe PDF dialog box appears.

3. Enter a name for the PDF file, and click **Save**.

Xcelsius generates the Adobe PDF file. The generated PDF file is automatically opened and the visualization is visible on the first page of the document. The visualization in the PDF file is dynamic and interactive.

**Note:** When the visualization is exported, any external files used by External components, are created and placed in a folder with the same name and location as the exported visualization. The external files must remain in the same folder as the visualization for the visualization to work properly.

## Emailing your visualization with Outlook



Once your visualization is complete, you can export it using Microsoft Outlook.

You can preview your visualization in Outlook. Click the Send to Outlook button on the toolbar. Outlook is launched and your visualization is inserted in an email. The visualization is dynamic and interactive. You can use this email as an exported visualization.

► **To export an Xcelsius visualization with Outlook**

1. Create an Xcelsius visualization.
2. On the **File** menu, point to **Export**, and click **Outlook**.

Xcelsius generates a SWF file. Outlook is launched and the SWF file is attached to a new email message that can be customized and sent.

## Exporting your visualization to a Plumtree portal

Once your visualization is complete, you can export it to a Plumtree portal. The visualization in the Plumtree Portal is dynamic and interactive.

► **To export an Xcelsius visualization to a Plumtree portal**

1. Create an Xcelsius visualization.
2. On the **File** menu, point to **Export**, and click **Macromedia Flash (SWF)**.

The Export Macromedia Flash (SWF) dialog box appears.

3. Enter a name for the SWF file, and click **Save**.  
Xcelsius generates the Macromedia Flash file.
4. Place the SWF visualization on your web server.
5. In Xcelsius, on the **File** menu, point to **Export**, and click **Plumtree**.  
The Plumtree Export Options dialog box appears.
6. Customize the size of your visualization in the Plumtree portal.  
**Note:** Click Scale ->X and Scale ->Y to maintain the proportions of the visualization.
7. In the **URL Path** box, type the URL of the visualization you placed on the web server.
8. Click **Publish**.

Xcelsius generates an HTML file with the name of the SWF file that references the visualization at the URL path.

**Note:** The SWF file must be exported to the location you set in the URL path. The HTML file must have access to the SWF file.

By creating a gadget from this HTML file, your Xcelsius visualization can be added directly into your Plumtree portal. For information on creating gadgets, refer to the Plumtree documentation.

## Exporting your visualization to Word

When your visualization is complete, you can export it to a Microsoft Word document. The visualization in the Microsoft Word document is dynamic and interactive.



You can preview your visualization in a Word document. Click the Send to Microsoft Word button on the toolbar. Microsoft Word is launched and your visualization is displayed on the first page. The visualization in the Word document is dynamic and interactive. You can save the preview document as a Word document.

### ► To export an Xcelsius visualization to Word

1. Create an Xcelsius visualization.
2. On the File menu, point to Export, and click Word.  
The Export Word (DOC) dialog box appears.
3. Enter a name for the Word document, and click Save.

Xcelsius generates a Word document and embeds a SWF of your visualization in the document.



**Note:** If your visualization in Word is static, on the Microsoft Word Control toolbar click the Exit Design Mode button.

## Taking a snapshot of your visualization

The Snapshot menu items allow you to export the current preview data. To enable the snapshot feature, you must be in preview mode. On the File menu, point to Snapshot and click one of the following export methods:

- **Back to Excel**  
An Excel spreadsheet (XLS) with the changes made in preview mode is generated.  
**Note:**
  - This option is only available when an Excel spreadsheet has been imported into the visualization.
  - To export a copy of the original Excel file imported into the visualization, on the Data menu, click Export Model and save the file.
- **Macromedia Flash (SWF)**  
A Macromedia Flash (SWF) file with the changes made in preview mode is generated.
- **HTML**  
An HTML file and a Macromedia Flash (SWF) with the changes made in preview mode are generated.
- **PowerPoint Slide**  
A Microsoft PowerPoint file with one slide that contains a Macromedia Flash (SWF) file with the changes made in preview mode is generated.
- **Outlook**  
A Microsoft Outlook email that contains the Macromedia Flash (SWF) file with the changes made in preview mode is generated.
- **Adobe PDF**  
An Adobe PDF file with the changes made in preview mode is generated.





## Frequently Asked Questions ◀



# 6

## chapter

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## Installation questions

### Do I need to install Macromedia Flash to use Crystal Xcelsius?

The Macromedia Flash player is required for Crystal Xcelsius to function properly. If you did not install Macromedia Flash as part of the installation process, you can download and install Flash from the Macromedia web site <http://www.macromedia.com>.

### Why doesn't Crystal Xcelsius function after I upgrade or install Microsoft Office?

When Crystal Xcelsius is installed, it automatically configures itself to work with the version of Microsoft Office that is installed. If you upgrade or change the version of Microsoft Office on your machine, Crystal Xcelsius must be re-installed to work properly with the new version.

## Microsoft Excel questions

### Can I re-import an Excel file with a renamed spreadsheet?

See “[Re-importing with renamed sheets](#)” on page 37 for information about renamed spreadsheets.

### Why does my table look different than my Excel spreadsheet?

The Table component only supports the Verdana font. Your Excel spreadsheets may be using a different font which will result in minor visual differences between the spreadsheet and your tables. To match your views, change the spreadsheet font to Verdana.

## Microsoft PowerPoint questions

### How can I embed an Crystal Xcelsius SWF file into an existing PowerPoint presentation?

Within Crystal Xcelsius you can embed your current SWF file into a new PowerPoint presentation using the Export to PowerPoint options. See [“Exporting your visualization to PowerPoint” on page 77](#) for more information.

## Troubleshooting questions

### Why doesn't my component show scientific formatting?

The visual display of scientific formatted numbers is not supported at this time. Calculations that are dependent upon scientific formatted numbers are not affected.

### Why doesn't my URL button work?

Your URL must include `http://` for it to function correctly.

### What happened to the scenarios I saved?

If you are having trouble saving and loading scenarios with the Scenario button, refer to [“How does the local scenario buttons component work?” on page 61](#).

### Why can't I drag my Slider, Dial, or other single value component?

The values of single value components that are linked to cells with formulas cannot be adjusted. This prevents inconsistencies in the visualization.

## Why won't my SWF file print correctly?

Printing your SWF file through the menu of the Flash Player does not work because the Flash Player does not print transparent objects properly. Printing through the browser may also print the SWF file with incorrect proportions.

► **To correctly print your SWF file**

1. Take a screen shot of the SWF file.

**Tip:** Press the CTRL and PRINTSCREEN keys simultaneously to capture the full screen or ALT and PRINTSCREEN to capture the active window.

2. Paste the screen shot into an image program.
3. Print through that program's print options.

## Why do I receive a Server Busy message?

The Server Busy message means that Excel has a pending operation or is busy performing an instruction. Check Excel to make sure it is not in the process of editing and then click Retry on the warning dialog box.

## Why do I receive the message “A script in this movie is causing Flash Player to run slowly...”?

The Macromedia Flash Player used to view Crystal Xcelsius visualizations displays this message when a script has taken more than 60 seconds to run. Due to the complexity of Crystal Xcelsius visualizations, larger visualizations running on slow machines may cause this message to be shown, particularly at startup. If you click No on the message dialog box, the visualization should load properly.

**Note:** While in Preview Mode, pressing Yes to abort the script causes the preview to stop working. You will need to switch to Design Mode, then back to Preview Mode, to properly preview the visualization.

## Why does my visualization start in a strange state?

When a visualization is loaded, all selectors insert their default selection data into their Insert In ranges to populate other components with data. When more than one selector inserts into the same range, the selector at the highest level inserts last. This overrides the default data inserted by the other selectors.

You can use the Object Browser to view the order of the components and change the order using the Layer Options.

## Why are my data sources not refreshing?

Certain data sources are denoted as static with a green Excel icon. These data sources do not refresh during the course of the visualization. Please see [“Dynamic and static data sources” on page 30](#).

## Why are formula-based indexes for my VLOOKUP array not changing at runtime?

To maintain the speed and efficiency of the VLOOKUP function, Crystal Xcelsius does not recalculate formulas in the index column of a VLOOKUP array.

If you have a VLOOKUP function that contains a formula in the index column, the index column cell always contains the initial value of the formula.

## Why are my URL-based images not visible in preview mode?

### Relative paths

URL references to images that are relative paths do not display in preview mode because the preview SWF file is generated in a temporary directory.

When you export the SWF file to a location that will make the relative paths valid, the images will load properly.

### Jpeg files on a web site

If you are referencing jpeg files on a web site, be sure that the jpeg files are not progressive jpegs. Progressive jpegs load in stages, which allows low-bandwidth users to see an image quickly and without having to wait for the entire image to load.

Crystal Xcelsius cannot display progressive jpegs that are referenced by a URL. If you select the embed option when you reference a progressive jpeg, Crystal Xcelsius displays the progressive jpeg as expected.

## **Why am I getting a Truncation Occurred... message when I try to preview my visualization?**

Crystal Xcelsius has a default value for the maximum number of rows that can be referenced in either a formula or source data for a component. If you are getting the Truncation Occurred... message when you click preview, your visualization contains a function that has a reference to an array of cells that exceeds the maximum number of rows setting.

You can change this setting with the Maximum Rows setting on the Data menu. The Maximum Rows setting exists to help ensure optimal performance of Crystal Xcelsius visualizations.

## **Why are my international settings not used by my XLF?**

An XLF uses the international settings of the machine it was created on until the spreadsheet is re-imported into the XLF. These settings include items such as the decimal and thousands separator characters.

## **Questions about supported features**

### **What Excel functions are supported by Crystal Xcelsius?**

See [“Supported Excel Functions” on page 220](#) of the online reference guide (on your Crystal Xcelsius installation disk) for a complete list of functions.

### **What is the maximum limit of rows for a single spreadsheet selection?**

There is no limit to the number of rows for a selection. However, the size of your selection can affect the performance of your visualization. Crystal Xcelsius warns you if you select more than 512 rows.

### **Does Crystal Xcelsius support Excel files that link to other Excel files?**

No, this feature is not supported by Crystal Xcelsius.

## How large can my Excel file be?

There is no limit to the size of an Excel spreadsheet that can be used in Crystal Xcelsius. There are a number of factors, however, which may affect the performance of your visualization. These include:

- the number of components you have on the canvas
- the amount of data that is being changed during the simulation
- the complexity of the calculations being performed

The speed of the computer can also greatly affect performance, and should be kept in mind when developing visualizations that will be distributed to other users.

## Which regional Excel formats does Crystal Xcelsius support?

Crystal Xcelsius automatically detects the regional formatting being used on your machine and adjusts its output appropriately.

For example, if your regional settings use / for the date separator, the date January 2nd 2004 appears as 1/2/04 in your Crystal Xcelsius visualizations. If your regional settings use - for the date separator, the date appears as 1-2-04 in the exported visualization.

These settings can be found under the Regional and Language Options of the Windows Control Panel. The following items are automatically adjusted:

- decimal separator
- thousands separator
- general format name
- month
- day
- year
- hour
- minute
- second
- time separator
- date separator

## Which non-standard characters are supported?


The following non-standard characters are supported at this time:

Ç	ë	æ	Ü	€
ü	è	Æ	á	
é	ï	ô	í	
â	î	ö	ó	
ä	ì	ò	ú	
à	Ä	û	ñ	
å	Å	ù	Ñ	
ç	É	Ö	ß	

## Why don't my Excel macros work?

Crystal Xcelsius does not support macros in Excel spreadsheets at this time.





# Crystal Xcelsius Professional ◀ Integration with Crystal Reports

# 7



chapter



## Overview

Crystal Xcelsius Professional 4.5 enables you to create interactive presentations from unmanaged Crystal Reports data. Using the new functionality in Live Office, you can create, you can create Xcelsius Visualizations against unmanaged Crystal Reports XI Release 1 data.

This chapter discusses how to use Excel spreadsheets built in Live Office as data sources for Crystal Xcelsius files.

### Note:

- The functionality discussed in this chapter is only supported in Live Office XI Release 2, Crystal Reports XI Release 1, and Crystal Xcelsius Professional 4.5.
- This document assumes working knowledge of Live Office and Crystal Reports.

## Terms used in this document

There are terms used in this document that you may not be familiar with. Look at this list to see what these terms refer to.

- XLF  
This is a Crystal Xcelsius Designer design file. It is the file that is created within the designer and where all the functionality of the future Xcelsius Visualization is configured.
- SWF  
This is a Macromedia Flash file. Crystal Xcelsius uses Macromedia Flash to render interactive files.
- Xcelsius Visualization  
This term is used for the final output of an Xcelsius file. For example, when you create a file in the Crystal Xcelsius Designer and export it to PowerPoint, the PowerPoint file is an Xcelsius Visualization.
- Live Office-enabled  
This term is used to describe an Excel spreadsheet that is created from a Live Office data source.
- Unmanaged Crystal report and unmanaged Crystal report data  
This term refers to a Crystal report or Crystal report data that is stored outside a BusinessObjects Enterprise or Crystal Reports Server system.

## Using Live Office data for Crystal Xcelsius visualizations

With Crystal Xcelsius Designer 4.5, you can create Crystal Xcelsius XLF (design files) and SWF (Macromedia Flash files) using Excel spreadsheets constructed from unmanaged Crystal reports.

New features in Live Office enable you to create report views based on unmanaged Crystal reports. For details about these features and how to use them, refer to the “Creating Report Views from Unmanaged Reports” chapter of the *Live Office User Guide*.

### Creating an Xcelsius visualization from a Live Office-enabled Excel spreadsheet

You can create an Xcelsius Visualization using data in a Live Office-enabled Excel spreadsheet. Live Office-enabled means that the data in the spreadsheet is actually a report view created from a Crystal report.

**Note:** The following procedures assume a working knowledge of Live Office.

► **To create an Xcelsius Visualization using Live Office**

1. Open a new Crystal Xcelsius canvas inand place the component that you want to use to display data on the canvas.
2. Double-click the component to open the **Properties Panel**.
3. On the **General** tab, click the Cell Selector button adjacent to the **Display Data** field.

You are prompted to import a model.

4. On the **Import Model** dialog box, click the **Browse** button and navigate to an Excel spreadsheet that was created using Live Office.
5. Click the spreadsheet and then click **OK**.  
The spreadsheet opens in a new window.
6. Select the cell range that you want to include in your Crystal Xcelsius Visualization and then click **OK**.

The spreadsheet closes and the new data is reflected in the Crystal Xcelsius Designer.

## Updating the visualization with new data

If the Live Office-enabled Excel spreadsheet is updated with new data, this new data is only reflected in your visualization if you re-import the spreadsheet.

► **To re-import the spreadsheet**

► **To re-import the Excel file**

1. On the **View** menu, click **Import Model**.

**Tip:** You can also re-import the Excel file by clicking the Import Model button on the tool bar.

2. Select the Excel file to be imported.
3. Select the re-import method.

For more information, see the list following this procedure.

4. Click **OK**.

The Import Model dialog box provides the following options for specifying how data in the re-imported spreadsheet interacts with the existing links in the visualization:

- **Refresh Data Sources**

This action will import the selected spreadsheet. Use this option when the Excel file is the same or with small changes and you need to keep all previous links. All previously established links to the spreadsheet will be saved. However, if since the last import you have inserted, deleted or modified rows, column or data, it is possible that the links will be affected. Review the links before saving the visualization.

- **Clear Data Sources**

This action will import the selected spreadsheet and all previously established links will be lost. Use this option when the Excel file is significantly different and you need to delete all the links.

- **Refresh Spreadsheet Format**

This option is available only when Refresh Data Sources is selected. Use this option when some spreadsheet formatting parameters have changed which you want updated.

For more detailed information on re-importing spreadsheets, see [“Re-importing the Excel file” on page 36](#).



# General Features Reference ◀



# 8

chapter



## Overview

This chapter discusses Properties panel features that are common to most components. Depending on the component that you are working with, some of these features may be unavailable.

## Common areas

The areas described in this section are common to most components, and always contain the same features.

### Font settings

The Font Settings area lets you customize font properties for a component.



#### Font

The font box displays the name of the font. By default, the font for all components is set to Verdana. If you chose to use non-embedded fonts in the visualization, you can use the font box to change the font for the component. For information about changing the font, see [“Using Font Options” on page 25](#).

#### Size

To set the font size, select or type a number from 8 to 72 in the size box.

#### Bold

Click the bold button to make the text bold.

#### Italic

Click the italic button to italicize the text.

#### Underline

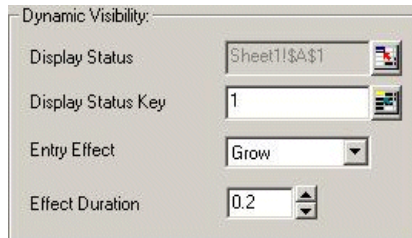
Click the underline button to underline the text.

#### Color

Click the Color Selector button to customize the font color. For information on Color Selector buttons, see [“Color Selector button” on page 100](#).

## Dynamic Visibility

The Dynamic Visibility area appears on the Behavior tab. The features in the Dynamic Visibility area control the visibility behavior of the component.



The screenshot shows a dialog box titled "Dynamic Visibility:". It contains four settings:

- Display Status:** A text field containing "Sheet1!\$A\$1" with a small icon to its right.
- Display Status Key:** A text field containing the number "1" with a small icon to its right.
- Entry Effect:** A dropdown menu currently showing "Grow".
- Effect Duration:** A numeric spinner field set to "0.2".

### Display Status

The Display Status Cell Selector button lets you select an empty cell in the imported spreadsheet to control the visibility of the component. When the user makes a selection, a variable corresponding to that selection is inserted into the empty cell. For more information on Cell Selector buttons, see [“Cell Selector button” on page 100](#).

**Note:** Do not link Display Status to a cell or range of cells already linked within the same component or one of your data sources will not refresh if it is changed dynamically.

### Display Status Key

The Display Status Key Cell Selector button lets you specify the values that the Display Status variable must match for the component to become visible. For more information on Cell Selector buttons, see [“Cell Selector button” on page 100](#).

### Entry Effect

The items on the Entry Effect list determine the visual effect a component has when it appears:

- **None**  
The component has no entry effect.
- **Fade-in**  
The component appears in a semi-transparent state and gradually becomes solid.

- **Grow**  
The component appears gradually until it reaches its full size.
- **Grow X First**  
The component appears gradually, first reaching its full width, and then reaching its full height.

### Effect Duration

The Effect Duration box is available only if you clicked Fade-in, Grow, or Grow X First on the Entry Effect list, and lets you determine how long the entry effect lasts. You can enter a value from 0 to 10, with 0 being the shortest duration, and 10 being the longest duration.

## Common boxes

### Transparency

The Transparency box lets you set the transparency value for a part of a component. You can enter a value from 0 to 100, with 0 being completely transparent, and 100 being completely solid.

### Weight

The Weight box determines how thick a line is. You can enter a value from 0 to 100, with 0 being the thinnest line, and 100 being the thickest line.

### X Shift

The X Shift box lets you shift text left or right relative to the position you specified in the Position list. To enter the X shift value, type a numerical value in the X Shift box, or use the up and down arrows adjacent to the X Shift box. Negative values shift the title left; positive values shift the title right.



## Y Shift

The Y Shift box lets you shift text up or down relative to the position you specified in the Position list. To enter the Y shift value, type a numerical value in the Y Shift box, or use the up and down arrows adjacent to the Y Shift box. Negative values shift the title downward; positive values shift the title upward.

## Common lists

### Position

The Position list lets you specify the position of text. Depending on the component that you are working with, some of the items on the Position list may be unavailable:

- Top Center
- Top Left
- Top Right
- Left
- Right
- Center
- Bottom Left
- Bottom Center
- Bottom Right

### Alignment

Click one of these items on the Alignment list to determine the alignment of text:

- Left
- Center
- Right

## Numeric Format

The Numeric Format list lets you apply predefined formats to numerical data displayed in the Xcelsius Visualization. Some of the formats on the Numeric Format list provide more options for customizing the appearance of numerical data.

### General

The General format displays numeric data as it appears. This format has no additional options for customization.

### Numeric

The Numeric format provides more options for customizing the format of numeric values.

#### Negative Values

The Negative Values list lets you select a format for negative values:

- Minus Sign Prefix
- Red Text
- Parenthesis
- Red Text with Parenthesis

#### Decimal Places

The Decimal Places box lets you enter the number of decimal places to display. You can enter a value from 0 to 20.

#### Use 1000 Separator

When you select the Use 1000 Separator check box, Xcelsius inserts commas into numerical values above 1000.

### Currency

The Currency format provides more options for customizing the format of currency values.

#### Negative Values

See [“Numeric” on page 98](#).

#### Decimal Places

See [“Numeric” on page 98](#).

**Prefix**

When you select the Prefix check box, Xcelsius precedes currency values with a symbol. This symbol is set to “\$” by default. To change the default symbol, enter the desired symbol in the adjacent Prefix box. The Prefix box is available only when you select the Prefix check box.

**Suffix**

When you select the Suffix check box, Xcelsius adds a symbol to the end of currency values. Enter the desired symbol in the adjacent Suffix box. The Suffix box is available only when you select the Suffix check box.

**Percent**

The Percent format provides one option for customizing the appearance of percentage values.

**Decimal Places**

See [“Numeric” on page 98](#).

**Date**

The Date format provides one option for formatting dates in the Xcelsius Visualization.

**Type**

Select the desired date format from the Type list.

**Time**

The Time format provides one option for formatting times in the Xcelsius Visualization.

**Type**

Select the desired time format from the Type list.

**Text**

The Text format displays numerical values as plain text. This format has no additional options for customization.

## From Spreadsheet

The From Spreadsheet format lets you keep numeric formats in the imported spreadsheet that are not supported by Xcelsius. When you click From Spreadsheet, the format string appears in the Format String box.

# Common buttons

The buttons described in this section appear on the Properties panels for most components.

## Cell Selector button

The Cell Selector button lets you select a cell or a cell range in the imported spreadsheet and link the Xcelsius Visualization to various data values. The different types of Cell Selector buttons are as follows:



- **Dynamic Data**

A Dynamic Data Cell Selector button lets you select cells with dynamic data. When the Xcelsius Visualization is refreshed, changes to the values in Dynamic Data cells will be reflected in the Xcelsius Visualization.



- **Static Data**

A Static Data Cell Selector button lets you select cells with static data. When the Xcelsius Visualization is refreshed, no change occurs to the values in Static Data cells.

When you click a Cell Selector button, the imported spreadsheet appears. Draw a box around the cell or cells you wish to select. The location number of the selected cell or cells appears in the Select a Range dialog box.

To return to the Properties panel, click OK in the Select a Range dialog box. The location number of the selected cell or cells appears in the box adjacent to the Cell Selector button.

## Color Selector button



The Color Selector button lets you select a custom color for part of the component.

When you click a Color Selector button, the Color dialog box appears. Select the desired color from the palette, or click Define Custom Colors to choose another color. When you are finished, click OK to return to the Properties panel.

## Browse button



The Browse button lets you manually enter values for a component instead of selecting the values in the imported spreadsheet. When you click the Browse button, a dialog box appears. In the dialog box, type the values directly into the cells. When you are finished, click OK to close the dialog box and return to the Properties panel.

## Information button



The Information button provides information about how a set of features on the Properties panel works together. When you click the Information button, a new window opens, and an animated movie guides you through the way one or more features work. You can go to different pages in the movie, and click play or pause to find the information you need. When you are finished, close the window to return to the Properties panel.

# Common Alerts Tab features

Alerts let the user know that a predefined value has been reached. The features on the Alerts tab control how alerts behave for a component when the Xcelsius Visualization is run in its interactive format. Depending on the component that you are working with, some of the features described in this section may be unavailable.

## Enable Alerts

The Enable Alerts check box controls whether alerts are enabled for the component.

## Alert Method

You can click one of the following options in the Alert Method area to define the alert method for the component:

- Value Alerts  
The alerts use values that you specify in the imported spreadsheet.
- Percent Alerts  
The alerts use percentages that you specify using the Alert Levels slider.

## Alert Definition

You can click one of the following options in the Alert Definition area to define the ideal value type for the component:

- **Low Values are Good**  
Use this option when the ideal value type is lower than the target value. For example, select Low Values are Good when you set alerts for expenses, and you want the expense values to be as low as possible.
- **High Values are Good**  
Use this option when the ideal value type is higher than the target value. For example, select High values are Good when you set alerts for revenue, and you want the revenue values to be as high as possible.
- **Middle Values are Good**  
Middle values are Good is unavailable if you clicked Value Alerts in the Alert Method area. Use this option when the ideal value type is as close as possible to the target value. For example, select Middle Values are Good when you set alerts for inventory, and you want the inventory quantities to be as accurate as possible

## Alert Variable

The Alert Variable list is available for multi-variable components only, and lets you specify whether you want to use X-axis values or Y-axis values to trigger alerts.

## Value Levels

Value Levels appears only if you clicked Value Alerts. You can specify the value levels for alerts in two ways:

- If you want to select value levels from the imported spreadsheet, click the Value Levels Cell Selector button. For information on Cell Selector buttons, see [“Cell Selector button” on page 100](#).
- If you want to enter value levels manually, click the Value Levels Browse button. For information on Browse buttons, see [“Browse button” on page 101](#).

## Number of Colors

The Number of Colors box appears only if you clicked Percent Alerts, and lets you specify the number of alert colors. To change the number of alert colors, use the up and down arrows adjacent to the Number of Colors box. You can have 2 to 10 alert colors.

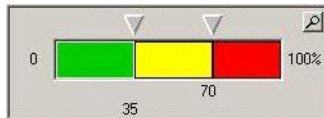
## Control Panel Limits



The Control Panel Limits button appears only if you clicked Percent Alerts. When you click the Control Panel Limits button, the Control Panel Limits dialog box appears and lets you set the maximum and minimum percentage values.

## Alert Levels Color Scale

If you clicked Percent Alerts, the Alert Levels color scale lets you specify the percentages that will trigger the alert colors. To specify these percentages, drag the gray pointers above the color scale until the percentages that you want appear below the color scale.



If you clicked Value Alerts, the colors in the Alert Levels color scale represent the values you specified in Value Levels.

## Fill Color

The Color Selector button adjacent to Fill Color lets you customize the fill colors for different alert levels. To customize an alert color, click the color you wish to customize on the Alert Levels color scale. The Color Selector button becomes active for that color. For information on Color Selector buttons, see [“Color Selector button” on page 100](#).

## Font Color

Font Color is available only if you selected Enable Value Alerts. The Color Selector button adjacent to Font Color lets you customize the color of the font used to display value alerts. For information on Color Selector buttons, see [“Color Selector button” on page 100](#).

## No Data Color

The Color Selector button adjacent to No Data Color lets you customize the alert color for parts of the component which have no data. For information on Color Selector buttons, see [“Color Selector button” on page 100](#).

## Alert Level Display

The three check boxes in the Alert Level Display area let you customize how alerts are displayed:

- **Enable Object Alerts**  
The Enable Object Alerts check box controls whether the alert colors for the component can be displayed.
- **Enable Value Alerts**  
The Enable Value Alerts check box controls the visibility of a value that is displayed in an alert color box.
- **Enable Alert Level Display**  
The Enable Alert Level Display check box controls whether the component displays all alert colors and the value ranges they represent.

**Note:** The Alert Level Display area is available for most single value components, and is unavailable for all other components.

## Target

You can specify the target value by typing the numerical value in the Target box. This method works best for single value components.

Alternatively, you can use the Target Cell Selector button to select the target data in the imported spreadsheet. This method works best for chart components. For information on Cell Selector buttons, see [“Cell Selector button” on page 100](#).





# Chart Components Reference



# 9

chapter



## Overview

This chapter discusses the Properties panel features for the components in the Charts folder.

## General tab

### Common to all Chart components

#### Data Range

The options in this area select a range of Excel data that contains all of the data for the selected chart.

##### Data Range

Click Data Range to enable the options in this area.

Click the adjacent cell selector button to select a range of data from the spreadsheet.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

##### Series In

This option controls the format in which the series information is contained. The following options are available:

- Rows  
Click this option to indicate that the series information is contained in the rows of the selected range.
- Columns  
Click this option to indicate that the series information is contained in the columns of the selected range.

#### Series

The options in this area edit individual series data for the components.

The Name, X Values, and Y Values parameters all apply to the series name that is selected, indicated by a blue highlight, in the Series box.

## Series

Click Series to enable the options in this section.

Click a series in the list box to edit the data for that series.

## Add

Click Add to add a new series to the chart.

## Remove

Click Remove to remove a series from the chart. The series that is selected in the Series box will be removed.

## Name

Type in the Name box or click the adjacent cell selector button to set the name of the selected series.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

## X Values

Click the cell selector button adjacent to the X Values box to select the x values for the selected series.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

**Note:** This option does not apply to the OHLC or Candlestick Chart components.

## Y Values

Click the cell selector button adjacent to the Y Values box to select the y values for the selected series.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

**Note:** This option applies only to the Bubble and XY Chart components.

## Sizes

Click the cell selector button adjacent to the Sizes box to set the size value for the selected series.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

**Note:** This option applies only to the Bubble Chart component.

### Open

Click the cell selector button adjacent to the Open box to select the open value for the series.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

**Note:** This option applies only to the OHLC and Candlestick Chart components.

### High

Click the cell selector button adjacent to the High box to select the high value for the series.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

**Note:** This option applies only to the OHLC and Candlestick Chart components.

### Low

Click the cell selector button adjacent to the Low box to select the low value for the series.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

**Note:** This option applies only to the OHLC and Candlestick Chart components.

### Close

Click the cell selector button adjacent to the Close box to select the close value for the series.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

**Note:** This option applies only to the OHLC and Candlestick Chart components.

### Category Axis Labels

Click the cell selector button adjacent to the Category Axis Labels box to select the category axis labels for the selected series.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

## Titles

The options in this area set the various titles for the selected chart component.

**Chart title**

Type in the Chart Title box or click the adjacent cell selector button to set the title for the component.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

**Chart subtitle**

Type in the Chart Subtitle box or click the adjacent cell selector button to set the subtitle for the component.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

**Category (X) Axis Title**

Type in the Category (X) Axis Title box or click the adjacent cell selector button to set the X-axis title for the component.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

**Value (Y) Axis Title**

Type in the Value (Y) Axis Title box or click the adjacent cell selector button to set the Y-axis title for the component.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

## Drill Down tab

### Common to most Chart components

**Enable Drill Down**

Click Enable Drill down to enable the options on this tab.

**Note:**

- This tab does not apply to the Area, Stacked Area, Radar, and Filled Radar Chart components.
- The options on this tab are available only if a series has been added to the component on the General Tab.

## Chart Drill-Down Options

The options in this area define how the Chart component will behave when a selection is made. The following options are available:

- **Insert Series In**  
Click the Insert Series In cell selector button to select the cell into which the currently selected series name is inserted.  
For information on the cell selector button see [“Cell Selector button” on page 100](#).
- **Insert Value**  
Click an option on the Insert Value list to determine the structure of the data that is inserted when a selection is made. The following options are available:
  - **Position**  
A target cell is linked to the Chart component. When a selection is made on the Chart component the position value of the selection is entered in the target cell.
  - **Value**  
A target cell is linked to the Chart component. When a selection is made on the Chart component the source data value of the selection is entered in the target cell.
  - **Rows**  
A target row is linked to the Chart component. When a selection is made on the Chart component the row of source data values of the selection are entered in the target row.
  - **Columns**  
A target column is linked to the Chart component. When a selection is made on the Chart component the column of source data values of the selection are entered in the target column.
  - **Status List**  
A target range of cells is linked to the Chart component. When a selection is made on the Chart component a value of 1 is entered in the target cell in the range representing that selection and a value of 0 is entered in the other cells in the range
- **Series**  
Click an option from the Series list to select the series for which you want to configure. All series for the chart must be configured individually.

- **Insert Value In**

Click the cell selector button adjacent to the Insert Value In box to select the cells into which the selected data is inserted.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

- **Select Variable**

Click an option from the Select Variable list to determine the dimension of data that you would like inserted. The following options are available:

- **X Values**

This option is available for chart components with X and Y dimensions. The X values of the source data are inserted.

- **Y Values**

This option is available for chart components with X and Y dimensions. The Y values of the source data are inserted.

- **Open**

This option is available for the OHLC Chart and Candlestick Chart components only. The values from the open dimension of the source data are inserted.

- **High**

This option is available for the OHLC Chart and Candlestick Chart components only. The values from the high dimension of the source data are inserted.

- **Low**

This option is available for the OHLC Chart and Candlestick Chart components only. The values from the low dimension of the source data are inserted.

- **Close**

This option is available for the OHLC Chart and Candlestick Chart components only. The values from the close dimension of the source data are selected.

- **Size**

This option is available for the Bubble Chart component only. The values from the size dimension of the source data are selected.

**Note:** The Select Variable list is enabled only when Value is selected on the Insert Value list.

- **Source Data**

Click the cell selector button adjacent to the Source Data box to select the data that is inserted when a selection is made on the component.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

**Note:** This option is enabled only when Rows or Columns is selected on the Insert Option list.

### **Drill-Down Behavior**

The option in this area defines how the component recognizes that a selection has been made.

Click an option on the Update On list to define the recognition method of the component. The following options are available:

- **Mouse Click**

The user must click on an item to select it.

- **Mouse Over**

An item is selected when the pointer passes over it.

### **Default Options**

The options in this area set the default status of the component. The following options are available:

- **Series**

Click an option from the Series list to select the Series that will configure the default value.

- **Default Value**

Click a value from the Default Value list to select which element of the series will be selected by default when the Xcelsius Visualization is loaded. This option also determines which default data is inserted into the Insert Value In box when the Xcelsius Visualization is loaded.

## **Behavior tab**

### **Common to all Chart components**

#### **Dynamic Visibility**

For information on the options available in the Dynamic Visibility area see [“Dynamic Visibility” on page 95](#).



## Common to most Chart components

### Scale Behavior

The options in this area control how the chart axes scale as data changes.

**Note:** The options in this area do not apply to the Pie Chart component.

#### Auto Zoom Out

Click Auto Zoom Out to set the scaling behavior. The axis scale will only grow as data changes, and not shrink. This option is recommended when a chart will be used in an animation. Setting the scale to Auto Zoom Out minimizes chart rescaling.

#### Auto Scale

Click Auto Scale to set the scaling behavior. The axis scale will grow and shrink as data changes.

#### Manual Scale

Click Manual Scale to set the scaling behavior. The axis scale will not change as data changes. The minimum and maximum scale values are set at design time by the tool user.

#### Y-Axis Minimum Value

Type in the Y-Axis Minimum Value box or click the adjacent cell selector button to select a value to restrict the minimum value that can be displayed on the Y axis of the Chart component.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

**Note:** This option is enabled only when Manual Scale is selected.

#### Y-Axis Maximum Value

Type in the Y-Axis Maximum Value box or click the adjacent cell selector button to select a value to restrict the maximum value that can be displayed on the Y axis of the Chart component.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

**Note:** This option is enabled only when Manual Scale is selected.

### **X-Axis Minimum Value**

Type in the X-Axis Minimum Value box or click the adjacent cell selector button to select a value to restrict the minimum value that can be displayed on the X axis of the Chart component.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

**Note:** This option is enabled only when Manual Scale is selected.

### **X-Axis Maximum Value**

Type in the X-Axis Maximum Value box or click the adjacent cell selector button to select a value to restrict the maximum value that can be displayed on the X axis of the Chart component.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

**Note:** This option is enabled only when Manual Scale is selected.

### **Y-Axis Scale**

Click an option on the Y-Axis Scale list to select the format of the Y Axis for the Chart component. The following options are available:

- **Linear**  
Click this option to plot the Y axis values on a linear scale. Values plotted on a linear scale appear at evenly spaced intervals in the chart component.
- **Logarithmic**  
Click this option to plot the Y axis values on a logarithmic scale. Values plotted on a logarithmic scale appear at unevenly spaced intervals in the chart component. Smaller values have larger space intervals; larger values have smaller space intervals. Equal percentage changes are represented by equal distances.

### **X-Axis Scale**

Click an option on the X-Axis Scale list to select the format of the X Axis for the Chart component. The following options are available:

- **Linear**  
Click this option to plot the X axis values on a linear scale. Values plotted on a linear scale appear at evenly spaced intervals in the chart component.
- **Logarithmic**  
Click this option to plot the X axis values on a logarithmic scale. Values plotted on a logarithmic scale appear at unevenly spaced intervals in the chart component. Smaller values have larger space intervals; larger

values have smaller space intervals. Equal percentage changes are represented by equal distances.

### Zoom Out Sensitivity

This option tunes the scaling behavior for the Chart component. The Zoom Out Sensitivity setting determines how much an axis scale will grow as the data changes.

Drag the slider to set the Zoom Out Sensitivity. To increase sensitivity, drag the slider to the right. Moving the slider to the extreme left results in the axis scale increasing by a small factor when the chart scale changes. Moving the slider to the extreme right results in the axis scale increasing by a large factor when the chart scale changes.

**Note:** This option is enabled only when Auto Zoom Out is selected.

### Fixed Label Width

Click Fixed Label Width to lock the width of the axes labels so they will not be resized if the scale changes.

### Edit Label Unit Abbreviations

Click the Edit Label Unit Abbreviations Browse button to display the Label Unit Abbreviations dialog box.

For information on the Browse button see [“Browse button” on page 101](#).

**Note:** This option is available only when Fixed Label Width is selected.

### Label Unit Abbreviations dialog box

In the Displayed Sign boxes edit the unit abbreviations that appear on the axes labels.

## Animation

**Note:** The option in this section does not apply to the Area Chart and Stacked Area Chart components.

### Animation Enabled

Click Animation Enabled to add animation to the chart components when the visualization is run. In chart components with bars, the bars grow and shrink when the data changes and the visualization is run. In point-based chart components the points grow to full size when the visualization is run.

## Run Time options

The options in this area control the configuration options that appear on the chart in the generated SWF file. These options let you modify the Scale Behavior area of Chart components at run time in the generated SWF file.

### Show Focus Button



Click Show Focus Button to display the focus button on the run time configuration menu. Clicking on the focus button forces the chart to rescale the chart axes based on the current data.

### Show Reset Scale Button



Click Show Reset Scale Button to display the reset button on the run time configuration menu. Clicking on the reset button forces the chart to rescale the chart axes to the scale that the chart had when it first loaded.

### Show Scale Behavior Options



Click Show Scale Behavior Options to display the scale behavior options on the run time configuration menu. Clicking on the scale behavior options changes the scaling behavior of the Chart component; the chart axes will scale based on the new setting the next time the chart data changes. The scale behavior options have the following options available:

- Click On to set the scaling behavior to Auto Zoom Out.
- Click Off to set the scaling behavior to Manual Scale.
- Click Auto to set the scaling behavior to Auto Scale.

#### Note:



- If one or more of the run time options are enabled, the run time icon appears on the chart in the generated SWF file.
- When the pointer passes over the run time icon, all or part of the run time menu will appear, depending on the options enabled.



## Alerts Tab

For information on the features available on the Alerts Tab see [“Common Alerts Tab features” on page 101](#).

**Note:** The options on the Alerts Tab apply only to the Line, Column, Stacked Column, Bar, Stacked Bar, Combination, Bubble, XY, and Radar Chart components.

# Appearance tab

## Common to all Chart components

### Titles button

#### Chart Title

The options in this area configure the title area of the selected chart. The following options are available:

- Show Title

Click Show Title to display the Title and Subtitle on the selected Chart component.

**Note:** Show Title must be selected for the other options in this area to be enabled.

- Title Font Settings

For information on Font Settings see [“Font settings” on page 94](#).

- Subtitle Font Settings

For information on Font Settings see [“Font settings” on page 94](#).

- Alignment

Click an alignment format on the Alignment list to customize the Chart Title and Chart Subtitle. The following formats are available:

- Left
- Center
- Right.

- Show Border

Click Show Border to display a border around the title area.

- Border Color

Click the color selector button adjacent to Border Color to set the border color.

For information on the color selector button see [“Color Selector button” on page 100](#).

- Show Fill

Click Show Fill to display a background with a solid fill color behind the title area.

- **Fill Color**  
Click the color selector button adjacent to Fill Color to set the background fill color.  
For information on the color selector button see [“Color Selector button” on page 100](#).
- **Weight**  
Adjust the value in the Weight box to control the width of the border.

## Legend

The options in this area configure the legend area of the selected chart. The following options are available:

- **Show Legend**  
Click Show Legend to display a legend on the Chart component.  
**Note:** Show Legend must be selected for the other options in this area to be enabled.
- **Legend Font Settings**  
For information on Font Settings see [“Font settings” on page 94](#).
- **Show Border**  
Click Show Border to display a border around the legend area.
- **Border Color**  
Click the color selector button adjacent to Border Color to set the border color.  
For information on the color selector button see [“Font settings” on page 94](#).
- **Show Fill**  
Click Show Fill to display a background with a solid fill color behind the legend area.
- **Fill Color**  
Click the color selector button adjacent to Fill Color to set the background fill color.  
For information on the color selector button see [“Color Selector button” on page 100](#).
- **Weight**  
Adjust the value in the Border Weight box to control the width of the border.

- **Placement**  
Click an option on the Placement list to set the location of the legend area on the Chart component. The following options are available:
  - Top
  - Left
  - Right
  - Bottom
- **X Shift**  
For information on X Shift see [“X Shift” on page 96](#).
- **Y Shift**  
For information on Y Shift see [“Y Shift” on page 97](#).

## Layout button

### Chart Area

The options in this area configure the background and border appearance for the Chart component. The following options are available:

- **Show Background**  
Click Show Background to display a background behind the Chart component.
- **Use Custom Color**  
Click Use Custom Color to enable the ability to customize color in the Chart Area.
- **Background Color**  
Click the color selector button adjacent to Background Color to customize the background color.  
For information on the color selector button see [“Color Selector button” on page 100](#).

### Plot Area

The options in this area configure the plot area for the Chart component. The following options are available:

- **Show Border**  
Click Show Border to display a border around the plot area.
- **Border Color**  
Click the color selector button adjacent to Show Border to customize the border color.

For information on the color selector button see [“Color Selector button” on page 100](#).

- Show Fill

Click Show Fill to display a background with a solid fill color behind the plot area.

- Fill Color

Click the color selector button adjacent to Show Fill to set the background fill color.

For information on the color selector button see [“Color Selector button” on page 100](#).

- Margin

Adjust the value in the Margin box to control the amount of space between the outer edges of the plot area and the outer edges of the chart area.

- Weight

Adjust the value in the Weight box to customize the border weight.

- Use Major Divisions

Click Use Major Vertical Divisions to enable the Major Divisions options. This option controls the number of value labels displayed on the X axis. Type in the Use Major Divisions box or click the adjacent cell selector button to select the value of major divisions that appear on the Chart component.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

**Note:**

- This option does not apply to the Pie Chart component.
- This option is enabled only when the Manual is selected in the Scale Behavior area on the Behavior Tab.

- Use Interval

Click Use Interval to customize the interval of values displayed on the Y axis. Type in the Use Interval box or click the adjacent cell selector button to select the value of the interval between values.

For information on the cell selector button see [“Cell Selector button” on page 100](#).

**Note:** This option does not apply to the Pie Chart component.



- Minor Divisions

Adjust the value in the Minor Division box to control the number of lines that appear between the major grid lines.

**Note:** This option does not apply to the Pie Chart component.

## Horizontal Gridlines

**Note:** The options in this area do not apply to the Pie Chart component.

The options in this area control the display of horizontal grid lines in the plot area of the Chart component. The following options are available:

- Major Gridlines

Click Major Gridlines to display major horizontal grid lines in the plot area of the Chart component.

- Major Gridlines Color

Click the color selector button adjacent to Major Gridlines to customize the color of the major gridlines.

For information on the color selector button see [“Color Selector button” on page 100](#).

- Major Gridlines Weight

Adjust the value in the Major Gridlines Weight box to customize the weight of the major gridlines.

- Minor Gridlines

Click Minor Gridlines to display minor horizontal grid lines in the plot area of the Chart component.

- Minor Gridlines Color

Click the color selector button adjacent to Minor Gridlines to customize the color of the minor gridlines.

For information on the color selector button see [“Color Selector button” on page 100](#).

- Minor Gridlines Weight

Adjust the value in the Minor Gridlines Weight box to customize the weight of the minor gridlines.

## Vertical Gridlines

**Note:** The options in this area do not apply to the Pie Chart Component.

The options in this area control the display of vertical grid lines in the plot area of the Chart Component. The following options are available:

- **Major Gridlines**  
Click Major Gridlines to display major vertical grid lines in the plot area of the Chart component.
- **Major Gridlines Color**  
Click the color selector button adjacent to Major Gridlines to customize the color of the major gridlines.  
For information on the color selector button see [“Color Selector button” on page 100](#).
- **Major Gridlines Weight**  
Adjust the value in the Major Gridlines Weight box to customize the weight of the major gridlines.
- **Minor Gridlines**  
Click Minor Gridlines to display minor vertical grid lines in the plot area of the Chart component.
- **Minor Gridlines Color**  
Click the color selector button adjacent to Minor Gridlines to customize the color of the minor gridlines.  
For information on the color selector button see [“Color Selector button” on page 100](#).
- **Minor Gridlines Weight**  
Adjust the value in the Minor Gridlines Weight box to customize the weight of the minor gridlines.

## Common to most Chart components

### Y Axis button

**Note:** The options enabled by this button do not apply to the Pie Chart component. The buttons appear on the Appearance Tab for the Pie Chart component, but remain disabled.

#### Vertical Axis Title

The options in this area configure the vertical axis title for the Chart component. The following options are available:

- **Show Title**  
Click Show Title to display the Vertical Axis Title on the Chart component.

- Title Font Settings

For information on Font Settings see [“Font settings” on page 94](#).

## Vertical Axis

Use the options in this section to configure the appearance of the vertical axis

- Show Axis

Click Show Axis to display the vertical axis for the Chart component.

- Axis Color

Click the color selector button adjacent to Show Axis to set the axis color.

For information on the color selector button see [“Color Selector button” on page 100](#).

**Note:** This option applies to the vertical axis and tick marks.

- Weight

Axis Weight controls the width of the axis. Adjust the value in the Weight box to set the axis width.

**Note:** This option applies to the vertical axis and tick marks.

- Show Major Ticks

Click Show Major Ticks to display horizontal tick marks where the major grid lines intersect the vertical axis.

**Note:** This option does not apply to the Bar Chart component.

- Show Minor Ticks

Click Show Minor Ticks to display horizontal tick marks where the minor grid lines intersect the vertical axis.

**Note:** This option does not apply to the Bar Chart component.

## Vertical Axis Labels

The options in this area configure the appearance of the value labels displayed along the vertical axis. The following options are available:

- Show Labels

Click Show Labels to display value labels on the vertical axis. The value labels appear where the major grid lines intersect the vertical axis.

- Font Settings

For information on Font Settings see [“Font settings” on page 94](#).

- Numeric Format

For information on the Numeric Format list see [“Numeric Format” on page 98](#).

**Note:** This option does not apply to the Bar Chart component.

## X Axis button

**Note:** The options enabled by this button do not apply to the Pie Chart component. The buttons appear on the Appearance Tab for the Pie Chart component, but remain disabled.

### Horizontal Axis Title

The options in this area configure the horizontal axis title for the Chart component. The following options are available:

- **Show Title**  
Click Show Title to display the Horizontal Axis Title on the Chart component.
- **Title Font Settings**  
For information on Font Settings see [“Font settings” on page 94](#).

### Horizontal Axis

The options in this area configure the appearance of the horizontal axis. The following options are available:

- **Show Axis**  
Click Show Axis to display the horizontal axis for the Chart component.
- **Axis Color**  
Click the color selector button adjacent to Show Axis to set the axis color. For information on the color selector button see [“Color Selector button” on page 100](#).  
**Note:** This option applies to the horizontal axis and tick marks.
- **Weight**  
Axis Weight controls the width of the axis. Adjust the value in the Weight box to set the axis width.  
**Note:** This option applies to the horizontal axis and tick marks.
- **Show Major Ticks**  
Click Show Major Ticks to display vertical tick marks where the major grid lines intersect the horizontal axis.  
**Note:** This option does not apply to the Column and Line Chart components.
- **Show Minor Ticks**  
Click Show Minor Ticks to display vertical tick marks where the minor grid lines intersect the horizontal axis.

**Note:** This option does not apply to the Column and Line Chart components.

### Horizontal Axis Labels

The options in this area configure the appearance of the value labels that appear along the horizontal axis.

- Show Labels

Click Show Labels to display value labels on the horizontal axis. The value labels appear where the major grid lines intersect the horizontal axis.

- Font Settings

For information on Font Settings see [“Font settings” on page 94](#).

- Numeric Format

For information on the Numeric Format list see [“Numeric Format” on page 98](#).

**Note:** This option does not apply to the Line, Column, Radar, and Filled Radar Chart components.

### Series button

**Note:** The options enabled by this button do not apply to the Area, Stacked Area, and Filled Radar Chart components.

### Values

The options in this area configure the appearance of the value labels for the selected component. The value labels are displayed when the pointer passes over a value marker symbol. The following options are available:

- Show Values

Click Show Values to display value labels when the pointer passes over a marker symbol.

**Note:** This option does not apply to the XY and Bubble Chart components.

- Font Settings

For information on Font Settings see [“Font settings” on page 94](#).

**Note:** This option does not apply to the XY and Bubble Chart components.

- Numeric Format

For information on the Numeric Format list see [“Numeric Format” on page 98](#).

**Note:** This option does not apply to the XY and Bubble Chart components.

- **Current Value**  
This option controls the value displayed on the value labels. The following options are available:
  - X Values
  - Y Values
  - Size Values**Note:** This option applies only to the XY, Bubble, OHLC, and Candlestick Chart components.

### Plot Settings

The options in this area configure the plot area markers for the Chart component. The following options are available:

- **Show Markers**  
Click Show Markers to display line markers on the Chart component.  
**Note:** This option applies only to the Line, Combination, and Radar Chart components.
- **Use Custom Color**  
Click Use Custom Color to customize the appearance of the Chart component.  
**Note:** This option does not apply to the Combination Chart component.
- **Marker Size**  
Adjust the value in the Marker Size box to set the size of the markers displayed on the Chart component.  
**Note:** This option applies only to the Line, Combination, and Radar Chart components.
- **Transparency**  
For information on Transparency see [“Transparency” on page 96](#).
- **Show Lines**  
Click Show Lines to display dividing lines between the pie slices.  
**Note:** This option applies only to the Pie Chart component.
- **Weight**  
This option controls the width of the dividing lines. Adjust the value in the Weight box to customize the line weight.  
**Note:** This option is available only for the Pie Chart component.

- **Show Highlights**  
Click Show Highlights to enable the marker highlight display. Enabling this option displays a round highlight effect behind the chart marker symbols.  
**Note:** This option applies only to the Radar Chart component.
- **Bar Width**  
Adjust the value in the Bar Width box from 1 to 100 to set the width of the bars displayed on the Chart component  
**Note:** This option applies only to the Bar Chart Component.
- **Transparency**  
For information on Transparency see [“Transparency” on page 96](#).
- **Bar Gap**  
Adjust the value in the Bar Gap box from 1 to 100 to set the distance between bars displayed on the Chart component.  
**Note:** This option applies only to the Stacked Column and Stacked Bar Chart components.
- **Bar Overlap**  
Adjust the value in the Bar Overlap box from 1 to 100 to set the overlapping proximity of the bars displayed on the Chart component. The higher the value in the Bar Overlap box, the more the bars overlap.

## Bars

The options in this area configure the appearance of the series markers for the Chart component. The following options are available:

- **Series**  
Click an option from the Series list to select the series to modify. The Bar Color option applies only to the selected series.
- **Bar Color**  
Click the color selector button adjacent to Bar Color to customize the appearance of the bars displayed on the Chart component.

**Note:** The options in this area apply only to the Column, Stacked Column, Bar, and Stacked Bar Chart components.

## Lines & Markers

**Note:** The options in this section apply only to the Line, Area, Stacked Area, and Radar Chart components.

The options in this area configure the appearance of the series markers for the Chart component. The following options are available:

- Series

Click an option on the Series list to select the series to modify.

- Line Color

Click the color selector button adjacent to Line Color to customize the appearance of the lines displayed on the Chart component.

For information on the color selector button see [“Color Selector button” on page 100](#).

**Note:** This option applies only to the Line and Radar Chart components.

- Weight

Adjust the value in the Weight box to set the width of the line for the selected series.

**Note:** This option applies only to the Line and Radar Chart components.

- Marker

Click a marker format from the Marker list to set the marker symbol displayed on the Chart component. The following options are available:

- Circle
- Star
- Diamond
- Triangle
- X

**Note:** The option applies only to the Line and Radar Chart components.

- Marker Color

Click the color selector button adjacent to the Marker box to customize the color of the markers displayed on the Chart component.

For information on the color selector button see [“Color Selector button” on page 100](#).

**Note:** This option applies only to the Line and Radar Chart components.

## Markers

**Note:** The options in this area apply only to the OHLC and Candlestick Chart components.

The options in this area customize the markers displayed on the Chart components. The following options are available:



- **Series**  
Click one of the items on the Series list to specify the series for which you want to customize colors.
- **Positive Color**  
Click the color selector button adjacent to Positive Color to customize the color for a series in which the close value is higher than the open value.  
For information on the color selector button see [“Color Selector button” on page 100](#).
- **Negative Color**  
Click the color selector button adjacent to Negative color to customize the color for a series in which the close value is lower than the open value.  
For information on the color selector button see [“Color Selector button” on page 100](#).

### Series Settings

**Note:** The option in this area is available only for the Area, Stacked Area, and Filled Radar Chart components.

The option in this area customizes the appearance of the series displayed on the Chart component. The following option is available:

- **Transparency**  
For information on Transparency see [“Transparency” on page 96](#).

## Specific to the Pie Chart component

### Series button

#### Slices

The options in this area configure the appearance of the pie slices for the Pie Chart component.

- **Data Point**  
Click an option on the Data Point list to select the slice to be customized.
- **Slice Color**  
Click the color selector button adjacent to Slice Color to customize the color of the slice selected on the Data Point list.  
For information on the color selector button see [“Color Selector button” on page 100](#).

## Specific to the Combination Chart component

### Series button

#### Column Plot Settings

The options in this area configure the plot area markers for the Combination Chart component. The following options are available:

- Bar Width  
Adjust the value in the Bar Width box from 1 to 100 to set the width of the bars displayed on the Combination Chart component
- Transparency  
For information on Transparency see [“Transparency” on page 96](#).

#### Line Plot Settings

The options in this area configure the plot area markers for the Combination Chart component.

- Show Markers  
Click Show Markers to display line markers on the selected chart.
- Marker Size  
Adjust the value in the Marker Size box to set the size of the markers displayed on the Combination Chart component.
- Transparency  
For information on Transparency see [“Transparency” on page 96](#).

#### Series Markers

The options in this area customize the appearance of the Series Markers that appear on the Combination Chart component. The following options are available:

- Use Custom Color  
Click Use Custom Color to customize the appearance of the selected markers.
- Series  
Click an option on the Series list to select the series to modify. The other options in the section apply only to the selected.
- Series Type  
Click an option from the Series Type list to select the type of markers to represent the selected Series.

- Bar Color

Click the color selector button adjacent to Bar Color to customize the appearance of the bars displayed on the Combination Chart component.

For information on the color selector button see [“Color Selector button” on page 100](#).

**Note:** This option is enabled only when Series Type is set to Column.

- Line Color

- Click the color selector button adjacent to Line color to customize the appearance of the lines displayed on the Combination Chart component.

**Note:** This option is enabled only when Series Type is set to Line.

- Line Weight

Adjust the value in the Line Weight box to control the width of the line for the selected series.

**Note:** This option is enabled only when Series Type is set to Line.

- Marker

Click a marker format from the Marker list to set the marker symbol displayed on the Combination Chart component. The following options are available:

- Circle
- Diamond
- Star
- Triangle
- X

- Marker Color

Click the color selector button adjacent to the Marker box to customize the appearance of the markers displayed on the Combination Chart component.

For information on the color selector button see [“Color Selector button” on page 100](#).

## Specific to the Bubble Chart component

### Series button

#### Plot Settings

The options in this area configure the plot area markers for the Bubble Chart component. The following options are available:

- Use Custom Color  
Click Use Custom Color to customize the appearance of the Bubble Chart component.
- Bubble Size  
Adjust the value in the Bubble Size box from 1 to 100 to customize the size of the bubbles displayed on the Bubble Chart component.
- Transparency  
For information on Transparency see [“Transparency” on page 96](#).

#### Bubble

The options in this area configure the appearance of the series markers for the Bubble Chart component. The following options are available:

- Series  
Click an option from the Series list to select the series to modify.
- Bubble Color  
Click the color selector button adjacent to Color to customize the appearance on the bubbles that appear on the Bubble Chart component.  
For information on the color selector button see [“Color Selector button” on page 100](#).

## Specific to the XY Chart component

### Series button

#### Plot Settings

The options in this area configure the plot area markers for the XY Chart component. The following options are available:

- Use Custom Color  
Click Use Custom Color to customize the appearance of the XY Chart component.

- **Symbol Size**  
Adjust the value in the Symbol Size box to customize the size of the symbols displayed on the XY Chart component
- **Transparency**  
For information on Transparency see [“Transparency” on page 96](#).

## Symbol

The options in this section configure the appearance of the series markers for the XY Chart component. The following options are available:

- **Series**  
Click an option on the Series list to select the series to modify. The Bubble Color option applies only to the selected series.
- **Symbols**  
Click a symbol format from the Symbol list to set the symbol displayed on the Combination Chart component. The following options are available:
  - Circle
  - Diamond
  - Star
  - Triangle
  - X
- **Symbol Color**  
Click the color selector button adjacent to the Symbols list to customize the appearance of the symbols displayed on the XY Chart Component.  
For information on the color selector button see [“Color Selector button” on page 100](#).

## Specific to the Filled Radar Chart component

### Series button

#### Series Colors

The options in this area configure the appearance of the series markers for the Filled Radar Chart component. The following options are available:

- **Series**  
Click an option from the Series list to select the series to modify. The other parameters in this section apply only to the selected series.

- Fill Color

Click the color selector button adjacent to Fill Color to customize the appearance of the area filled in to represent data on the Filled Radar Chart component.

For information on the color selector button see [“Color Selector button” on page 100](#).

### **Series Settings**

- Transparency

For information on Transparency see [“Transparency” on page 96](#).



# Single Value Component Reference

# 10

chapter

## Overview

This chapter discusses Properties panel features for the components in the Single Value folder.

## General tab

The features on the General tab let you link the single value component to data.

## Common to all components

This section applies to all single value components.

### Title

To give the single value component a title, type the desired title in the Title text box. Alternatively, you can click the Title Cell Selector button, and select a title in the imported spreadsheet. For information on Cell Selector buttons, see [“Cell Selector button” on page 100](#).

## Common to most components

This section applies to all single value components except the dual slider components.

### Link to Cell

To link the single value component to data, you can enter the data value manually in the Link to Cell box. Alternatively, you can click the Link to Cell Cell Selector button to link the single value component to a cell in the imported spreadsheet. When the user changes the value in the single value component, the value in the linked cell changes. For more information on Cell Selector buttons, see [“Cell Selector button” on page 100](#).

## Specific to Dual Slider components

This section applies to the following components:

- Dual Slider-0
- Dual Slider-1



## Low Data

Low Data lets you specify the default value for the left pointer on the dual slider component. To enter the low data value manually, type the desired value in the Low Data box. Alternatively, you can click the Low Data Cell Selector button to select the value in the imported spreadsheet. For information on Cell Selector buttons, see [“Cell Selector button” on page 100](#).

## High Data

High Data lets you specify the default value for the right pointer on the dual slider component. To enter the high data value manually, type the desired value in the High Data box. Alternatively, you can click the High Data Cell Selector button to select the value in the imported spreadsheet. For information on Cell Selector buttons, see [“Cell Selector button” on page 100](#).

# Behavior tab

The features on the Behavior tab determine how the single value component behaves when the Xcelsius Visualization is run in its interactive format.

## Common to all components

The features in this section appear on the Behavior tabs for all single value components. Depending on the component that you are working with, some of these features may be unavailable.

## Dynamic Visibility

For information about the features in the Dynamic Visibility area, see [“Dynamic Visibility” on page 95](#).

## Initial Limits Calculation

The Initial Limits Calculation list provides several options for setting limits for single value components, and ensuring that the initial values are within the limits. Depending on the component that you are working with, some of these options may be unavailable:

- **Manual**  
The minimum and maximum limits are set manually.
- **Value Based**  
The limits comprise a tight range around the value.

- **Zero Based**  
The limits comprise a range that includes the value, and have zero as either the upper or lower limit.
- **Zero Centered**  
The limits comprise a range that includes the value and zero.
- **Alert Based**  
The limits comprise a range that covers all alert levels.

The Initial Limits Calculation list is unavailable for play button, spinner, and value components.

### Lower Limit Behavior

The Lower Limit Behavior list provides three options for setting the behavior of the minimum value on the single value component. Depending on the component that you are working with, some of these options may be unavailable:

- **Fixed**  
The user cannot set the value to a number less than the minimum value.
- **Adjustable**  
The user can adjust the minimum value when the Xcelsius Visualization is run in its interactive format. This option is available for all components except the value components.
- **Open**  
The user can set the value to any number that does not conflict with the maximum value.

**Note:** The Lower Limit Behavior list is unavailable for play button components.

### Upper Limit Behavior

The Upper Limit Behavior list provides three options for setting the behavior of the maximum value on the single value component. Depending on the component that you are working with, some of these options may be unavailable:

- **Fixed**  
The user cannot set the value to a number greater than the maximum value.
- **Adjustable**  
The user can adjust the maximum value when the Xcelsius Visualization is run in its interactive format. This option is available for all components except the value components.

- Open

The user can set the value to any number that does not conflict with the Lower Limit.

The Upper Limit Behavior list is unavailable for play button components.

## Minimum Value

To set the minimum value for the component, type the value in the Minimum Value box. Alternatively, you can click the Minimum Value Cell Selector button to select the value in the imported spreadsheet. For more information on Cell Selector buttons, see [“Cell Selector button” on page 100](#).

## Maximum Value

To set the maximum value for the component, type the value in the Maximum Value box. Alternatively, you can click the Maximum Value Cell Selector button to select the value in the imported spreadsheet. For more information on Cell Selector buttons, see [“Cell Selector button” on page 100](#).

## Increment Size

Use the Increment Size box to restrict manually entered values to specific increments, such as dozens. Enter the desired increment in the Increment Size box.

## Snap to Scale

Select the Snap to Scale check box to force the graphical representation of the component to match the value.

**Note:** Snap to Scale is unavailable for play button and value components.

## Play Options

The Play Options area lets you customize the behavior of the play button for single value components.

**Note:** The Play Options area is unavailable for dual slider and spinner components.

### Play Time

The Play Time box lets you set the duration of the play sequence in seconds. You can enter a value from 1 to 100, with 1 being the shortest duration, and 100 being the longest duration.

## **Show Play Button**

The Show Play Button check box controls the visibility of the play button for the component.

## **Auto Rewind**

The Auto Rewind check box controls whether the play sequence for the component automatically rewinds when the Xcelsius Visualization is run in its interactive format.

## **Auto Replay**

The Auto Replay check box controls whether the play sequence for the component automatically replays when the Xcelsius Visualization is run in its interactive format.

## **Sound Enabled**

Select the Sound Enabled check box to enable sound for the component.

## **Show Slider**

The Show Slider check box appears in the Play Options area for the play button components only. This check box controls the visibility of the slider for the play button components.

## **Show Rew/Fwd**

The Show Rew/Fwd check box appears in the Play Options area for the play button components only. This check box controls the visibility of the rewind and forward buttons for the play button components.

## **Show Prev/Next**

The Show Prev/Next check box appears in the Play Options area for the play button components only. This check box controls the visibility of the previous and next buttons for the play button components.

## **Common to some components**

The features in this section apply to specific components in the Single Value folder.

## **Mouse Sensitivity**

The Mouse Sensitivity slider determines how sensitive the value of the component is to pointer movements. When the setting is high, small pointer movements can change the value by large increments. When the setting is low, pointer movements change the value by small increments. The Mouse Sensitivity slider is available for value, gauge, and dial components.

## Mouse Tracking

Click one of the options under Mouse Tracking to specify the pointer action that the user must perform to change the value on a component:

- Vertical

The user must move the pointer vertically to change the value.

- Radial

The user must move the pointer in a circular motion to change the value.

The Mouse Tracking options are available for the gauge and dial components only.

## Autoresize Value Box

Select the Autoresize Value Box check box to enable the component to automatically resize and fit the number displayed. The Autoresize Value Box check box appears for the spinner and value components only.

## Object Elasticity

The Object Elasticity slider appears for the gauge components only, and determines the elasticity of the movement of the needle.

## Scroll Behavior

The Scroll Behavior options appear for the values components only. Click one of the options under Scroll Behavior to determine the action the user must perform to change the value:

- Manual

The user must drag the pointer vertically to change the value.

- Auto

The user must drag the pointer and place it above or below the value component to change the value.

# Alerts tab

For information about the features on the Alerts tab, see [“Common Alerts Tab features” on page 101](#).

## Appearance tab

The features on the Appearance tab let you customize the appearance of the single value component.

### Common to all components

The features in this section apply to all or most single value components.

#### Titles button

##### Show Title

The Show Title check box controls the visibility of the component title. When you select Show Title, the following options for customizing the appearance of the value become available:

- Position  
For information about the Position list, see [“Position” on page 97](#).
- X Shift  
For information about the X Shift box, see [“X Shift” on page 96](#).
- Y Shift  
For information about the Y Shift box, see [“Y Shift” on page 97](#).
- Font Settings  
For information about the features in the Font Settings area, see [“Font settings” on page 94](#).

##### Show Value

The Show Value check box controls the visibility of the selected value for the component. When you select Show Value, the following options for customizing the appearance of the value become available:

- Position  
For information about the Position list, see [“Font settings” on page 94](#).
- X Shift  
For information about the X Shift box, see [“X Shift” on page 96](#).
- Y Shift  
For information about the Y Shift box, see [“Y Shift” on page 97](#).

- **Font Settings**

For information about the features in the Font Settings area, see [“Font settings” on page 94](#).

- **Numeric Format**

For information about the Numeric Format list, see [“Numeric Format” on page 98](#).

- **Low X**

This option appears for the dual slider components only. The Low X box lets you shift the low value label left or right relative to the position specified on the Position list. Negative values shift the low value label left; positive values shift the low value label right.

- **High X**

This option appears for the dual slider components only. The High X box lets you shift the high value label left or right relative to the position specified on the Position list. Negative values shift the low value label left; positive values shift the low value label right.

- **Low Y**

This option appears for the dual slider components only. The Low Y box lets you shift the low value label up or down relative to the position specified on the Position list. Negative values shift the low value label downward; positive values shift the low value label upward.

- **High Y**

This option appears for the dual slider components only. The High Y box lets you shift the high value label up or down relative to the position specified on the Position list. Negative values shift the high value label downward; positive values shift the high value label upward.

## Layout button

### Use Custom Color

Selecting the Use Custom Color check box provides the following options for customizing the color of a part of the component. Some of these options may be unavailable depending on the component that you are working with:

- Low Marker Color
- High Marker Color
- Gutter Color
- Background Color

- Up Marker
  - Default Arrow
  - Selected Arrow
  - Default Fill
  - Selected Fill
- Down Marker
  - Default Arrow
  - Selected Arrow
  - Default Fill
  - Selected Fill
- Show Background
- Play Button Color
- Play Symbol Color
- Slider Gutter Color
- Marker Color
- Limits Fill Color
- Fill Color
- Pointer
- Rim
- Middle
- Backing
- Grip

To customize a color, click the adjacent Color Selector button. For information on Color Selector buttons, see [“Color Selector button” on page 100](#).

## Common to some components

The features in this section apply to specific single value component types.

### Titles button

The features in this section apply to progress bar, gauge, and slider components.



## Show Limits

The Show Limits check box controls the visibility of the upper and lower limits for the component. When you select Show Limits, the following options for customizing the appearance of the upper and lower limits are available:

- Font Settings

For information about the features in the Font Settings area, see [“Font settings” on page 94](#).

## Layout button

The features in this section apply to progress bar, gauge, slider, and dial components.

## Show Ticks

The Show Ticks check box controls the visibility of ticks (the small markers that distinguish values) for the component. When you select Show Ticks, the following options for customizing the appearance of the ticks are available:

- Number of Ticks

The Number of Ticks box lets you specify the number of large ticks displayed for the component. You can enter a value from 2 to 21.

- Number of Subticks

The Number of Subticks box lets you specify the number of small ticks displayed between the large ticks. You can enter a value from 0 to 21.

- Ticks Color

To customize the color of the ticks, click the adjacent Color Selector button. For information on Color Selector buttons, see [“Color Selector button” on page 100](#).

- Minimum Angle

This option is available for gauge and dial components only. The Minimum Angle box lets you specify the minimum angle the needle can rotate to.

**Note:** Minimum Angle is unavailable if you chose Open from the Lower Limit Behavior list.

- Maximum Angle

This option is available for gauge and dial components only. The Maximum Angle box lets you specify the maximum angle the needle can rotate to.

**Note:** Maximum Angle is unavailable if you chose Open from the Lower Limit Behavior list.





# Selector Components Reference

# 11

chapter

## Overview

This chapter discusses Properties panel features for the components in the Selectors folder.

## General Tab

### Common to all Selector components

#### Insert Data

The options in this area define the data for the Selector components and how the components will behave when a selection is made.

**Note:** On the Properties panel of the Accordion Menu component, the Insert Data area is equivalent to the Data area.

#### Insert In

Click the cell selector button adjacent to the Insert In box to select the cells into which the selected data is inserted.

For information on the cell selector button see the General Chapter.

**Note:** The Insert In box is equivalent to the Insert Item In box and the Insert Category In, for items and categories respectively, box on the Properties panel of the Accordion Menu.

#### Insert Option

The options on this list determine the structure of the data that is inserted when a selection is made. There are six parameters:

- **Position**  
A target cell is linked to the selector component. When a selection is made on the selector component the position value of the selection is entered in the target cell.
- **Label**  
A target cell is linked to the selector component. When a selection is made on the selector component the label of the selection is entered in the target cell.
- **Value**  
A target cell is linked to the selector component. When a selection is made on the selector component the source data value of the selection is entered in the target cell.

- Rows

A target row is linked to the selector component. When a selection is made on the selector component the row of source data values of the selection are entered in the target row.

- Columns

A target column is linked to the selector component. When a selection is made on the selector component the column of source data values of the selection are entered in the target column.

- Status List

A target range of cells is linked to the selector component. When a selection is made on the selector component a value of 1 is entered in the target cell in the range representing that selection and a value of 0 is entered in the other target cells in the range.

**Note:** The target cells must be empty.

## Categories

This option creates expandable top-level representations of each group of items. The Add and Remove buttons control the groups displayed in the Categories box.

**Note:** This option applies only to the Accordion Menu component.

## Name

Type in the Name box or click the adjacent cell selector button to select the label for the currently selected category.

For information on the cell selector button, see [“Cell Selector button” on page 100](#).

**Note:** This option applies only to the Accordion Menu component.

## Items

Click the cell selector button adjacent to the Items box to select the labels that are associated with the currently selected category.

For information on the cell selector button, see [“Cell Selector button” on page 100](#).

**Note:** This option applies only to the Accordion Menu component.

## Information button

For information on the Information button, see [“Information button” on page 101](#).

## Source Data

Type in the Source Data box, click the Browse button, or click the cell selector button adjacent to the Source Data box to select the data that is inserted when a selection is made when the Insert Option is rows, columns, or values.

For information on the Browse button, see [“Browse button” on page 101](#)

For information on the cell selector button, see [“Cell Selector button” on page 100](#).

### Note:

- The Source Data option applies only to the following components:
  - Check Box
  - Filter
  - Icon
  - Play Selector
  - Source Data
  - Table
  - List View
  - Toggle Button
- The Source Data Browse button does not appear on the Properties panel of the following components:
  - Filter
  - List View
  - Play Selector
  - Table

## Common to most Selector components

### Titles

The options in this section set the titles and labels for the Selector components.

**Note:** The Titles area does not apply to the Table and Icon components.

### Title

Type in the Title box or click the adjacent cell selector button to select the title for the component.

For information on the cell selector button, see [“Cell Selector button” on page 100](#).

## Labels

Click the Browse button adjacent to the Labels box to manually enter the labels, or click the adjacent cell selector button to select the labels.

For information on the Browse button, see [“Browse button” on page 101](#).

For information on the cell selector button, see [“Cell Selector button” on page 100](#).

### Note:

- The Labels options do not apply to the following components:
  - Label Based Menu
  - Accordion
  - List View
  - Filter
- The Labels Browse button is available only for the following components:
  - Check Box
  - Combo Box
  - Fish-Eye Picture Menu
  - List Box

## Titles

Click the Browse button adjacent to the Titles box to manually enter the titles, or click the adjacent cell selector button to select the titles for the component.

For information on the Browse button, see [“Browse button” on page 101](#).

For information on the cell selector button, see [“Cell Selector button” on page 100](#).

**Note:** Titles is not the same option as Title, and applies only to the Filter component.

## Display Data

Click the cell selector button adjacent to the Display Data box to select the data that is displayed on the component.

For information on the cell selector button, see [“Cell Selector button” on page 100](#).

**Note:** The Display Data area applies only to the following components:

- Table
- List View
- Icon

## Orientation

The options in this area control how the selectable elements of the component are arranged. Click Horizontal or Vertical to select the orientation of the component.

**Note:** The Orientation area applies only to the Label Based Menu and Radio Button components.

## Image Files

The options in this section set the image files for the selected component.

### Embedded

Click Embedded to embed the image files in the selected component. The selected files will become a part of the exported Xcelsius Visualization.

### Import

When you click Import the imageData dialog box appears. On the imageData dialog box specify the images or SWF files to embed in the selected component. To import an external file to be embedded in the report, click the File Browser button and select the file to be imported.



**Note:**

- Import is only available if Embedded has been selected.
- The Image Files apply only to the Fish-Eye Picture Menu and Sliding Picture Menu components.

## Specific to the Icon component

### Label

Type in the Label box or click the adjacent cell selector button to set the label for the Icon component.

For information on the cell selector button, see [“Cell Selector button” on page 100](#).

## Specific to the Filter component

### Display Options

This area controls the number of combo boxes displayed for the selected Filter component.



**Number of Filters**

Adjust the value displayed in the Number of Filters box to adjust the number of filters displayed on the Filter component.

## Behavior tab

### Common to most Selector components

#### Dynamic Visibility

For information on the features available in the Dynamic Visibility area, see [“Dynamic Visibility” on page 95](#).

**Note:** The Dynamic Visibility area does not apply to the Source Data component.

#### Behavior Options

**Note:** The Behavior Options area does not apply to the following components:

- Source Data
- Play Selector
- Accordion Menu

**Always Expanded**

Click Always Expanded to permanently display all of the labels contained on the menu. Selecting this option disables several other options and enables the Update On parameter.

**Sound Enabled**

Check the Sound Enabled box to enable sound for the selected component

**Open Animation**

Click Open Animation to enable the open/close animation. The feature adds a fraction-of-a-second animation to the way it is opened and closed.

**Open Direction**

This option defines the direction into which the menu will expand once it is opened.

**Note:**

- For the Label Based Menu and Radio Button components, the behaviors for this parameter depend on the Orientation parameter.

When the orientation is horizontal the following options are available on the Open Direction list:

- Left
- Right

When the orientation is vertical the following options are available on the Open Direction list:

- Center down
- Left down
- Right down
- Center up
- Right up
- Left up

- This option does not apply to the following components:
  - Fish-Eye Picture Menu
  - Sliding Picture Menu

**Update On**

The options on this list define how the component recognizes that a selection has been made. The following options are available:

- Mouse Click  
The user must click on an item to select it.
- Mouse Over  
An item is selected when the pointer passes over it.

**Note:** This option does not apply to the following components:

- Fish-Eye Picture Menu
- Sliding Picture Menu

**Open On**

The options on this list define how the component recognizes that a selection has been made that requires data to be displayed. The following options are available:

- Mouse Click  
Data is displayed only when the user clicks on the selector component.

- Mouse Over

Data is displayed only when the user moves the pointer over the selector component.

**Note:** This option does not apply to the following components:

- Fish-Eye Picture Menu
- Sliding Picture Menu

## Default Options

### Default Selection

This feature sets the default state of the component. You can customize which portion of the component is selected, or if the component is selected or not selected when the Xcelsius Visualization is first launched. The options on the list vary depending on the component you are working with.

**Note:** This option does not apply to the following components:

- Filter
- Accordion Menu
- Source Data

### Default Category

Choose the Category that will be selected in the component when the Xcelsius Visualization is loaded. This option also determines which default data is inserted into the Insert Category In cell when the Xcelsius Visualization is loaded.

**Note:** This option applies only to the Accordion Menu component.

### Default Item

Choose the Category Item that will be selected in the component when the Xcelsius Visualization is loaded. This option also determines which default data is inserted into the Insert Item In range when the Xcelsius Visualization is loaded.

**Note:** This option applies only to the Accordion Menu component.

- Accordion Menu
- Source Data

## Specific to the Fish-Eye Picture Menu component

### Fish Eye behavior

#### **Fish Eye Friction**

Adjust the Fish Eye Friction scale to configure the friction of the fish eye popup effect as on a mouse-over event.

#### **Fish Eye Max**

Adjust the Fish Eye Max scale to change the mouse-over size of the Fish-Eye Picture Menu thumbnails.

## Specific to the Sliding Picture Menu component

### Slide method

The options on this list control how the Sliding Picture Menu scrolls through the thumbnails. The following are the available options:

- Arrows  
The user must click on the arrow icons to scroll through the Sliding Picture Menu thumbnails.
- Mouse  
The Sliding Picture Menu will scroll through the thumbnails as the user moves the mouse.

### Slide increment

The options on this list control the scrolling behavior of the Sliding Picture Menu. The following are the available options:

- One  
The Sliding Picture Menu will scroll through the thumbnails one at a time.
- Page  
The Sliding Picture Menu will scroll through the thumbnails a page at a time.

### Friction

Adjust the Friction scale to control the friction of the slide behavior as the user scrolls through the thumbnails for the Sliding Picture Menu.

## Specific to the Table component

### Row selectability

The options in this area configure whether the rows of a Table selector component are selectable

#### **Row Number**

Enter or adjust the row number in the Row Number box. This number affects the Selectable check box.

#### **Selectable check box**

This option enables or disables row selection for the row displayed in the Row Number box.

#### **Select All**

Click the Select All button to enable row selection for all rows of the table.

#### **Deselect All**

Click the Deselect All button to disable row selection for all rows of the table.

## Specific to the Accordion Menu component

### Open/Close behavior

The options in this area control the open/close behavior for the Accordion Menu component.

#### **Friction**

Adjust the Friction scale to customize the way that the menu items open/close.

## Specific to the Source Data component

### Source data options

#### **Index Cell**

Type in the Index Cell box or click the adjacent cell selector button to bind the Selected Index of the Source Data component to the spreadsheet. When the Xcelsius Visualization runs, it will select the item in its source data at the

specified index. When the index is bound to the spreadsheet, any changes to the underlying spreadsheet value will cause the Source Data component to insert the source data that corresponds to the new index.

For information on the cell selector button, see [“Cell Selector button” on page 100](#).

## Specific to the Play Selector component

### Play options

#### **Show Slider**

Click Show Slider to display a slider that tracks the progress of the presentation of the Play Selector component when it is in interactive format.

#### **Auto Rewind**

Click Auto Rewind to have the presentation of the Play Selector component automatically rewound after playing.

#### **Auto Replay**

Click Auto Replay to have the presentation automatically replayed after playing.

#### **Sound Enabled**

Click Sound Enabled to enable sound effects when selections are made on the Play Selector component.

#### **Show Rew/Fwd**

Click Show Rew/Fwd to display the Rewind and Fast Forward buttons on the Play Selector component.

#### **Show Prev/Next**

Click Show Prev/Next to display the Previous and Next buttons on the Play Selector component.

#### **Play Time**

Adjust the value in the Play Time box to control the length of time the Play Selector component will play.

## Alerts tab

For information on the features available on the Alerts Tab, see [“Common Alerts Tab features” on page 101](#).

**Note:** The Alerts Tab applies only to the following components:

- Icon

## Appearance tab

**Note:** The Source Data component does not have an Appearance Tab.

## Common to most Selector components

### Label background

**Note:** The Label Background area applies only to the Label Based Menu, Check Box, and Filter components

#### Show Background

Click Show Background to display a background behind the items on the Ticker component.

#### Use Custom Color

Click Use Custom Color to customize the appearance of the component. The parts of the component that can be customized vary depending on the component you are working with. The following options can be customized by clicking the color selector button:

- Default Fill Color

**Note:** Default Fill Color applies only to the Label Based Menu.

- Selected Fill Color

**Note:** Selected Fill Color applies only to the Label Based Menu and Filter components.

- Mouse Over Fill Color

**Note:** Mouse Over Fill Color applies only to the Label Based Menu and Filter components.

For information on the color selector button, see [“Color Selector button” on page 100](#).

## Separation

Adjust the value in the Separation box to control the spacing between menu items. The higher the Separation number, the greater the spacing between menu items.

**Note:** This option applies only to the Label Based Menu component.

## Transparency

For information on the transparency feature, see [“Transparency” on page 96](#).

## Labels

### Note:

- The Labels area does not apply to the following components:
  - Radio Button
  - Table
  - Check Box
  - List View
  - Play Selector
- The Labels area corresponds to the Item Labels area on the Properties panel of the Accordion Menu component.

## Show Labels

Select Show Labels to display labels on the component.

**Note:** This option applies only to the following components:

- Fish-Eye Picture Menu
- Sliding Picture Menu
- Toggle Button

## Position

For information about the Position list, see [“Position” on page 97](#).

**Note:** This option applies only to the following components:

- Radio Button
- Sliding Picture Menu

## Alignment

For information about the Alignment list, see [“Alignment” on page 97](#).

**Note:** This option does not apply to the following components:



- Icon
- Sliding Picture Menu
- Filter

### **X Shift**

For information on X Shift, see [“X Shift” on page 96](#).

**Note:** This option applies only to the Label Based Menu, List Box, and Toggle Button components.

### **Y Shift**

For information on Y Shift, see [“Y Shift” on page 97](#).

**Note:** This option applies only to the Label Based Menu, List Box, and Toggle Button components.

### **Font Settings**

For information on Font Settings, see [“Font settings” on page 94](#).

**Note:** This option does not apply to the Icon component.

### **Numeric Format**

For information on the Numeric Format list, see [“Numeric Format” on page 98](#).

**Note:** This option does not apply to the following components:

- Icon
- Toggle Button

### **Mouse Over Text**

Click the adjacent color selector button to customize the Mouse Over Text color.

For information on the color selector button, see [“Color Selector button” on page 100](#).

**Note:** This option applies only to the following components:

- Combo Box
- List Box
- Label Based Menu
- Accordion Menu
- Filter

## Selected Text

Click the adjacent color selector button to customize the Selected Text color. For information on the color selector button, see [“Color Selector button” on page 100](#).

**Note:** This option applies only to the following components:

- Combo Box
- List Box
- Label Based Menu
- Toggle Button
- Accordion Menu
- Filter

## Rows Displayed

Adjust the value in the Rows Displayed box to control the number of rows that appear in the drop-down list.

**Note:** This option applies only to the Combo Box and Filter components.

## Filter Gap

Adjust the value in the Filter Gap box to set the amount of space displayed between the lists on the Filter component.

**Note:** This option applies only to the Filter component.

## Title button

**Note:** This area does not apply to the Radio Button, Table, Toggle Button, and Play Selector components.

## Show Title

Click Show Title to display a title on the component.

## Position

For information about the Position list, see [“Position” on page 97](#). X Shift

For information on X Shift, see [“X Shift” on page 96](#).

## Y Shift

For information on Y Shift, see [“Y Shift” on page 97](#).

## Font Settings

For information on Font Settings, see [“Font settings” on page 94](#).

## Layout button

**Note:** This button applies only to the following components:

- Fish-Eye Picture Menu
- Sliding Picture Menu
- Accordion Menu
- List View
- Play Selector

### Use Custom Color

Click Use Custom Color to customize the appearance of the component. The parts of the component that can be customized vary depending on the component you are working with. The following options can be customized by clicking the color selector button:

- Fill Color

**Note:** This option applies only to the following components:

- Accordion Menu

- Category area

**Note:** These options apply only to the Accordion Menu component.

- Default
- Mouse Over
- Selected

- Item area

- Default
- Mouse Over
- Selected

- Label Bar Color

**Note:** This option applies only to the Fish-Eye Picture Menu and Sliding Picture Menu components.

- Background Color

**Note:** This option applies only to the Fish-Eye Picture and Sliding Picture Menu components.

- Arrow Up

**Note:** This option applies only to the Sliding Picture Menu component.

- Arrow Down

**Note:** This option applies only to the Sliding Picture Menu component.

- Disabled Arrow  
**Note:** This option applies only to the Sliding Picture Menu component.
- Button Up  
**Note:** This option applies only to the Sliding Picture Menu component.
- Button Down  
**Note:** This option applies only to the Sliding Picture Menu component.
- Disabled Button  
**Note:** This option applies only to the Sliding Picture Menu component.
- Navigation Button area  
**Note:** These options apply only to the Accordion Menu component.
  - Arrow Default
  - Arrow Down
  - Arrow Disabled
  - Fill Default
  - Fill Down
  - Fill Disabled
- Scroll Bar area  
**Note:** These options apply only to the following components:
  - Accordion Menu
  - List View
  - Thumb Color  
**Note:** This option does not apply to the List View component.
  - Arrow Color
  - Gutter Color
  - Bar Color  
**Note:** This option does not apply to the List View component.
- Thumb Nail Background area  
**Note:** These options apply only to the Fish-Eye Picture Menu and Sliding Picture Menu components.
  - Default Color
  - Select Color
  - Mouse Over Color

- Show Background area  
**Note:** These options apply only to the Play Selector component.
  - Background Color
  - Button Background Color
  - Button Foreground Color
  - Gutter Color
  - Slide Color
- Header area  
**Note:** These options apply only to the List View component.
  - Header Color
  - Selected Fill
  - Mouse Over Fill
- Sort Symbol area  
**Note:** These options apply only to the List View component.
  - Symbol Color
  - Selected Fill
  - Mouse Over Fill
- Backing area  
**Note:** This option applies only to the List View component.
  - Backing Color
- Row area  
**Note:** These options apply only to the List View component.
  - Row Color 1
  - Selected Fill
  - Row Color 2
  - Mouse Over Fill

For information on the color selector button, see [“Color Selector button” on page 100](#).

## Image Sizing

**Note:** The options in the area apply only to the Fish-Eye Picture and Sliding Picture Menu components.

The following options configure the image sizing behavior of the thumbnail images for the menu:

- **Method**  
Click an option from the Method list to set the sizing method of the thumbnail images for the menu. The following options are available:
  - **None**  
The images will not change from their default size. Only the portion of the image that fits inside the thumbnail area will be visible.
  - **Scale**  
The image will scale down to fit into the thumbnail area. The aspect ratio of the image will be preserved.
  - **Stretch**  
The image will be sized to fit inside of the thumbnail area.
- **Height**  
Adjust the value in the Height box to set the height of the thumbnail images.
- **Width**  
Adjust the value in the Width box to set the width of the thumbnail images.

## Margins

**Note:** The options in the area apply only to the Fish-Eye Picture and Sliding Picture Menu components.

The following options are available:

- **Horizontal**  
Adjust the value in the Horizontal box to set the horizontal margin for the thumbnail area.
- **Vertical**  
Adjust the value in the Vertical box to set the vertical margin for the thumbnail area.

## Markers

**Note:**

- This area applies only to the Combo Box, List Box, Radio Button, Check Box, Toggle Button, and Filter components.
- On the Properties panel of the List Box and Radio Button components the Markers & Backgrounds area corresponds to the Markers area.

## Use Custom Color

Click Use Custom Color to customize the appearance of the component. The parts of the component that can be customized vary depending on the component you are working with. The following options can be customized by clicking the color selector button:

- List Scroll Bar  
**Note:** This option applies only to the Combo Box and Filter components.
- List Gutter Color  
**Note:** This option applies only to the Combo Box and Filter components.
- Default Arrow Color  
**Note:** This option applies only to the Combo Box and Filter components.
- Default Fill  
**Note:** This option applies only to the List Box component.
- Selected Fill  
**Note:** This option applies only to the List Box component.
- Mouse Over Fill  
**Note:** This option applies only to the List Box component.
- Thumb Color  
**Note:** This option applies only to the List Box component.
- Arrow  
**Note:** This option applies only to the List Box component.
- Transparency  
**Note:** This option applies only to the List Box component.
- Off Fill  
**Note:** This option applies only to the Toggle Button component.
- On Fill  
**Note:** This option applies only to the Toggle Button component.

## Show Background

**Note:** The Show Background options apply only to the Radio Button component.

The following options are available in the Show Background area:

- Background Fill Color  
Click the adjacent color selector button to customize the background color of the component.

For information on the color selector button, see [“Color Selector button” on page 100](#).

- Transparency

For information on transparency, see [“Transparency” on page 96](#).

- Marker Size

Adjust the value in the Marker Size box to specify the size of the component markers.

- X-Margin

Adjust the value in the X-Margin box to control the amount of space between the left and right edges of the background and the radio buttons.

- Y-Margin

Adjust the value in the Y-Margin box to control the amount of space between the top and bottom edges of the background and the radio buttons.

- Marker Default

Click the adjacent color selector button to customize the default appearance of the marker.

For information on the color selector button, see [“Color Selector button” on page 100](#).

- Marker Selected

Click the adjacent color selector button to customize the appearance of the marker when it is selected by the user.

For information on the color selector button, see [“Color Selector button” on page 100](#).

## Specific to the Table component

### Grid

The options in this area enable the grid display for the Table component.

#### Show Grid

Click Show Grid to enable the grid display for the Table component.

**Note:** Selecting the Show Grid option only displays a grid for cells that do not have a cell border or a cell pattern specified in Excel.



## Grid Color

Click the adjacent color selector button to customize the appearance of the grid.

For information on the color selector button, see [“Color Selector button” on page 100](#).

**Note:** Grid Color is available only when Show Grid has been selected.

## Table background

The options in this area configure the colors of the highlights used to show selected rows and rows that the mouse pointer is over.

Click the adjacent color selector buttons to customize the appearance of the Table component. The following options are available:

- **Selected Fill**

This color will be overlaid above rows when they are selected. In order to keep spreadsheet cell colors from being hidden by the selection, the selection color is partially transparent.

- **Mouse Over Fill**

This color will be overlaid above rows when the mouse pointer is over them. In order to keep spreadsheet cell colors from being hidden by the mouse over, the mouse over color is partially transparent.

For information on the color selector button, see [“Color Selector button” on page 100](#).

## Scroll options

### Enable Scroll Bars

Click Enable Scroll Bars to allow scroll bars to be displayed on the Table component. Scroll bars allow the user to navigate to the areas of the table that do not fit within the view panel.

### Table Scale

Adjust the value in the Table Scale box to set the size of the labels displayed within the Table component.

## Horizontal Scroll Behavior

The options in this area customize the behavior of the horizontal scroll bar displayed on the Table component. The following options are available:

- **Enable**  
Click Enable to display a horizontal scroll bar on the Table component.
- **Disable**  
Click Disable to prevent the display of a horizontal scroll bar on the Table component.
- **Auto Hide**  
Click Auto Hide to display a horizontal scroll bar on the Table component that will be hidden when all the labels on the Table component are visible.

## Vertical Scroll Behavior

The options in this area customize the behavior of the vertical scroll bar displayed on the Table component. The following options are available:

- **Enable**  
Click Enable to display a vertical scroll bar on the Table component.
- **Disable**  
Click Disable to prevent the display of a vertical scroll bar on the Table component.
- **Auto Hide**  
Click Auto Hide to display a vertical scroll bar on the Table component that will be hidden when all the labels on the Table component are visible.

## Use Custom Color

Click Use Custom Color to customize the appearance of the Table component. Click the adjacent color selector buttons to customize the appearance of the following parts of the Table component:

- **Scroll Bar Color**
- **Scroll Arrow Color**
- **Scroll Gutter Color**

For information on the color selector button, see [“Color Selector button” on page 100](#).

## Specific to the Icon component

### Display

#### Show On/Off

Click Show On/Off to have the appearance of the Icon component differ when it is on and when it is off.

#### Show Custom Color

Click Show Custom Color to customize the appearance of the Icon component.

**Note:** This option is available only when alerts are disabled.

#### Color Fill

Click the adjacent color selector button to customize the color of the Icon component.

For information on the color selector button, see [“Color Selector button” on page 100](#).

#### Transparency

For information of Transparency, see [“Transparency” on page 96](#).

### Mouse Over

The options in this area determine the information displayed when the mouse pointer passes over the Icon component. Any combination of the label or value can be displayed, and the information otherwise hidden.

#### Show Labels

Click Show Labels to display the label when the pointer passes over the Icon component.

#### Font Settings

For information on Font Settings, see [“Font settings” on page 94](#).

#### Show Values

Click Show Values to display the value when the pointer passes over the Icon component.

#### Numeric Format

For information on the Numeric Format list, see [“Numeric Format” on page 98](#).

**Note:** If the application is unable to determine the structure of a format string that was imported from Excel, the Numeric Format parameter is set to From Spreadsheet.

## Specific to the Accordion Menu component

### Titles

#### Category Names

The options in this area customize the appearance of the Category Names that appear on the Accordion Menu component. The following options are available:

- **Alignment**  
Click an option from this list to set the alignment of the category names on the Accordion Menu component.  
For information on the Alignment list, see [“Alignment” on page 97](#).
- **Font Settings**  
For information on Font Settings, see [“Font settings” on page 94](#).
- **Numeric Format**  
For information on the Numeric Format list, see [“Numeric Format” on page 98](#).

## Specific to the List View component

### Titles button

#### Header

The options in this area customize the appearance of the header area of the List View component. The following options are available:

- **Font Settings**  
For information on Font Settings, see [“Font settings” on page 94](#).
- **Mouse Over Text**  
Click the adjacent color selector button to customize the color of the text when passed over by the pointer.  
For information on the color selector button, see [“Color Selector button” on page 100](#).
- **Selected Text**

Click the adjacent color selector button to customize the color of the text when selected.

For information on the color selector button, see [“Color Selector button” on page 100](#).

## **Value**

The options in this area customize the appearance of the Value that appears on the List View component. The following options are available:

- **Font Settings**

For information on Font Settings, see [“Font settings” on page 94](#).

- **Mouse Over Text**

Click the adjacent color selector button to customize the appearance of the text when passed over by the pointer.

For information on the color selector button, see [“Color Selector button” on page 100](#).

- **Selected Text**

Click the adjacent color selector button to customize the appearance of the text when selected.

For information on the color selector button, see [“Color Selector button” on page 100](#).





# Map Component Reference



# 12

chapter

## Overview

This chapter outlines Properties panel features for the components in the Maps Library folder.

## General tab

The features on the General tab link the map component to data in the imported Excel spreadsheet.

## Common to all Map components

The features in this section apply to all map components.

### Title

To give the map component a title, type the title in the Title box. Alternatively, you can click the Title Cell Selector button, and select a title in the imported spreadsheet. For information on Cell Selector buttons, see [“Cell Selector button” on page 100](#).

### Region Names

Region Names defines the codes for each region in the map component. These codes are then used by Display Data, Source Data, and Target Data to associate values to the appropriate region parameters. You can specify region codes in one of the following ways:

- If you want to use region codes from the imported spreadsheet, click the Region Names Cell Selector button, and select the region codes in the imported spreadsheet. For information on Cell Selector buttons, see [“Cell Selector button” on page 100](#).
- If you want to manually enter region codes, click the Region Names Browse button. In the Region Names dialog box, in the Label Name column, type the region codes. For information on Browse buttons, see [“Browse button” on page 101](#).

### Insert Option

The items on the Insert Option list determine how Xcelsius inserts data for a selected region:

- Rows  
Xcelsius inserts the relevant data into a row of empty cells.



- Columns  
Xcelsius inserts the relevant data into a column of empty cells.

## Source Data

The Source Data Cell Selector button lets you link the source data in the imported spreadsheet to the map component. For information on Cell Selector buttons, see [“Cell Selector button” on page 100](#).

## Insert In

The Insert In Cell Selector button lets you select a range of empty cells in the imported spreadsheet for Xcelsius to insert data into. When a user selects a region on the map component, the relevant data is inserted into the empty cells. If you chose Rows from the Insert Option list, you must select a row of empty cells with the same number of cells as a row in the source data range. If you chose Columns from the Insert Option list, you must select a column of empty cells with the same number of cells as a column in the source data range.

For information on Cell Selector buttons, see [“Cell Selector button” on page 100](#).

## Display Data

The Display Data Cell Selector button lets you select the display data for the map component in the imported spreadsheet. When a user selects a region on the map component, the relevant data is displayed.

Depending on the layout of the data range, Xcelsius searches for the region codes specified in Region Names in the following ways:

- If the data range has two columns and more than two rows, Xcelsius searches for the codes in the first column of the range.
- If the data range has two rows and more than two columns, Xcelsius searches for the codes in the first row of the range.
- If the data range has two columns and two rows, Xcelsius searches the first row and the first column to determine which one has the most region codes. Xcelsius then uses either the first row or the first column for region codes.

Depending on the location of the region codes, Xcelsius retrieves relevant display data in the following ways:

- If the region codes are in the first column, Xcelsius interprets the data to the right of the region codes as the display data.
- If the region codes are in the first row, Xcelsius interprets the data below the region codes as the display data.

For information on Cell Selector buttons, see [“Cell Selector button” on page 100](#).

## Behavior tab

The features on the Behavior tab control how the map component behaves in its interactive format.

### Common to all Map components

The features in this section apply to all map components.

#### Sound Enabled

The Sound Enabled check box determines whether the map component makes a sound when a selection is made. If you select Sound Enabled, the map component makes a sound when users select a region. If you clear Sound Enabled, the map component is silent when users select a region.

#### Update On

The items on the Update On list determine which action a user must perform to select a region:

- Mouse Click  
The user must click a region to select it.
- Mouse Over  
The user must place the pointer over a region to select it.

#### Dynamic Visibility

For information about the features in the Dynamic Visibility area, see [“Dynamic Visibility” on page 95](#).

## Alerts tab

For information about the features on the Alerts tab, see [“Common Alerts Tab features” on page 101](#).

# Appearance tab

The features on the Appearance tab let you customize the appearance of the map component.

## Common to all Map components

The features in this section apply to all map components.

### Show Title

Selecting the Show Title check box makes the map component title visible, and provides the following options for customizing the appearance of the title:

- Position  
For information about the Position list, see [“Position” on page 97](#).
- X Shift  
For information about the X Shift box, see [“X Shift” on page 96](#).
- Y Shift  
For information about the Y Shift box, see [“Y Shift” on page 97](#).
- Font Settings  
For information about the features in the Font Settings area, see [“Font settings” on page 94](#).

### Show Mouse Over

The Show Mouse Over check box controls whether the region name is displayed when users place their pointers on a region.

When you select Show Mouse Over, the Font Settings for the region name become active. For information about the features in the Font Settings area, see [“Font settings” on page 94](#).

### Show Values

The Show Values check box controls whether a region value appears when users place their pointers on a region in the map component.

## Region

The options in the Region area let you customize the appearance of the regions in the map component during certain pointer actions:

- **Default Fill**  
You can customize the default color for unselected regions and for regions which have no source data.
- **Transparency**  
For information on the Transparency box, see [“Transparency” on page 96](#).
- **Selectable Fill**  
You can customize the color for selectable regions and for regions which have source data.
- **Selected Fill**  
You can customize the color for selected regions.
- **Mouse Over Fill**  
You can customize the color for regions which users place their pointers on.

To customize a fill color, click the adjacent Color Selector button. For information on Color Selector buttons, see [“Color Selector button” on page 100](#).



# Background Component Reference

# 13

chapter

## Overview

This chapter discusses the Properties panel features for the components in the Art & Backgrounds folder.

## General tab

The features in this section apply to specific component types.

## Common to some components

This section applies to the background and image components.

### Capture Mouse Events

The Capture Mouse Events check box uses the background component to prevent users from interacting with other components. This feature only works if, in the design view, the background component has been stacked on top of the other components.

If you select Capture Mouse Events, any actions that users perform on the underlying components with their pointers have no effect.

If you clear Capture Mouse Events, users can interact with the underlying components.

**Note:** Capture Mouse Events is enabled for imported SWF files even if it is cleared on the General tab.

## Specific to Background components

The features in this section apply to the following components:

- Background-0
- Background-1
- Background-2
- Background-3

### Border Scale

The Border Scale slider lets you adjust the width of the background component's border. When you drag the pointer to the right, the border becomes thicker. When you drag the pointer to the left, the border becomes thinner.

## Specific to Shape components

The features in this section apply to the following components:

- Ellipse
- Rectangle

### Show Borders

Selecting the Show Borders check box makes the shape component border visible, and provides the following options for customizing the appearance of the border:

- Weight  
For information about the Weight box, see [“Weight” on page 96](#).
- Transparency  
For information about the Transparency box, see [“Transparency” on page 96](#).
- Color  
For information about the Color Selector button, see [“Color Selector button” on page 100](#).

### Fill Style

The items on the Fill Style list determine the color and shading of the shape component:

- Linear  
The fill changes from Color 1 to Color 2 as you move from one side of the shape component to the other.
- None  
The shape component has no fill.
- Radial  
The fill changes from Color 1 to Color 2 as you move from the center of the shape component to the edge.
- Solid  
The fill is a solid color.

## Fill Style Settings

Clicking linear, radial, or solid on the Fill Style list provides the following options for customizing the appearance of the fill:

- **Rotation**  
The Rotation box is available only if you clicked linear on the Fill Style list. You can enter a value from 0 to 360 in the Rotation box to determine the position of the axis where Color 1 and 2 meet.
- **Color 1**  
The options in the Color 1 area let you customize the appearance of Color 1 in the shape component:
  - **Color**  
The Color Selector button lets you select Color 1. For information on Color Selector buttons, see [“Color Selector button” on page 100](#).
  - **Transparency**  
For information on the Transparency box, refer to the [“Transparency” on page 96](#).
  - **Position**  
The Position slider determines the color gradient for Color 1. It is available only if you clicked linear or radial on the Fill Style list. If you drag the pointer to the far left, Color 1 changes into Color 2 almost immediately. If you drag the pointer to the far right, Color 1 does not change into Color 2 and fills the entire shape component.
- **Color 2**  
The options in the Color 2 area are available only if you clicked linear or radial on the Fill Style list. These options are the same as those for Color 1.

## Specific to Line components

The features in this section apply to the following components:

- Vertical Line
- Horizontal Line

### Line Color

The Color Selector button adjacent to Line Color lets you select the color of the line component. For information on Color Selector buttons, see [“Color Selector button” on page 100](#).



## Specific to the Image component

The features in this section apply to the image component only.

**Note:** The image component supports JPG and SWF files, as well as Xcelsius models. However, it does not support these file types:

- Progressive JPG
- JPG with CMYK coloring
- Nested SWF files

### Scale to Image Size on Import

When you select the Scale to Image Size on Import check box, the JPG or SWF file you import appears in its actual size. When you clear this check box, Xcelsius scales the imported file to the size of the image component on the canvas.

### Import

The Import button lets you browse for an image file. When you select an image file to import, the file name appears in the Filename box.

### Embed File

The Embed File check box lets you embed a copy of the image file in the Xcelsius model. If you select Embed File, the image file becomes part of the Xcelsius model. If you clear Embed File, Xcelsius loads the image file when the model is viewed in its interactive format.

### Show Background Color

The Show Background Color check box is available only if you imported a SWF file. This check box controls whether the background of the SWF file is displayed in the image component. Selecting Show Background Color makes the SWF file background visible.

## Behavior tab

For information about the features in the Dynamic Visibility area, see [“Dynamic Visibility” on page 95](#).





# Text Component Reference



# 14

chapter

## Overview

This chapter discusses the Properties panel features for the components in the Text folder.

## General tab

### Common to some components

#### Default Text from Cell (Input Text-0, Input Text-1, Input Text Area)

Click Default Text from Cell, and then click the Cell Selector button under Default Text from Cell to select the default text from the spreadsheet.

For information about Cell Selector buttons, see [“Cell Selector button” on page 100](#).

#### Enter Text

Use this option to manually enter the default text that will appear when the visualization is run.

#### Insert on Load (Input Text-0, Input Text-1, Input Text Area)

Select the Insert on Load check box to insert the default text into the Insert In cell once the generated application is loaded.

#### Insert In (Input Text-0, Input Text-1, Input Text Area)

Use the Insert In Cell Selector button to select the cell from the spreadsheet into which the text will be inserted.

For information about Cell Selector buttons, see [“Cell Selector button” on page 100](#).

## Specific to Label

#### Link to Cell

Use the Link to Cell Cell Selector button to link the label to a cell in the spreadsheet. Any change to the value of this cell will be reflected in the label.

For information about Cell Selector buttons, see [“Cell Selector button” on page 100](#).

# Behavior tab

## Common to some components

### Password Input (Input Text-0, Input Text-1)

Select the Password Input check box to display typed characters as asterisks (\*). This feature can be used to prevent passwords or other sensitive information from being displayed on screen.

### Maximum Characters (Input Text-0, Input Text-1, Input Text Area)

Select the Maximum Characters check box to limit the user input to the number of characters specified in the Maximum Characters value.

When the Maximum Characters check box is enabled, this value sets the maximum number of characters that a user can enter into the label. Enter the desired value in the text box, or use the up/down arrows to adjust the maximum number of characters.

### Characters Allowed (Input Text-0, Input Text-1)

Use this field to prevent users from entering certain characters into the label. All characters will be allowed if the field is left blank. You can manually enter the number of characters allowed in the Characters Allowed box.

Alternatively, you can click the Characters Allowed Cell Selector button to select the value in the spreadsheet. For information about Cell Selector buttons, see [“Cell Selector button” on page 100](#).

The simplest expression is a single character, such as “a”, which will allow users to enter the letter “a” into the label. Multiple expressions may be concatenated to create larger groups of allowed or not allowed characters. For example, the expression “abc” will allow the letters “a”, “b”, and “c” to be entered into the label by users.

The dash (-) can also be used to define a range of characters. The expression “a-z”, for example, defines all lowercase letters.

When there are only a few characters that you do not want to be allowed, it is easier to specify those characters instead of all of the allowed characters. This can be done by prefixing the entire field with the caret (^). Every character other than those specified in the field is then allowed.

For example, to prevent users from entering numbers, the field could be set to “^0-9”.

The caret can also be used throughout the string to switch between allowing and excluding characters. The first time it appears in the field, the characters defined by the expressions that follow it will not be allowed until another caret appears. When a second caret appears, the characters defined by the expressions that follow it will be allowed until another caret appears.

For example, setting Characters Allowed to `^0-9^abc^def` defines the following:

- numbers are not allowed
- a, b, and c, are allowed
- d, e, and f are not allowed

Because the dash and caret have special meanings, there is a specific way to specify the actual dash and caret as part of the character set.

To specify a dash or caret as part of the character set, place a backslash (\) before the special character. for example, a dash is specified by typing “\-” and a caret is specified by typing “\^”.

Because the backslash also has a special meaning, a backslash must also be represented by placing a backslash before it.

A few common characters sets are shown below:

- Whole Numbers (123): “\0-9”
- Real Numbers (1.5): “\0-9.”
- Fractions (1/2): “\-/0-9”
- Positive Whole Numbers: “0-9”
- Positive Decimal Numbers: “0-9.”
- Letters: “a-zA-Z”
- Numbers and Letters: “0-9a-zA-Z”

## Horizontal Scroll Behavior

This section lets you define the behavior of the horizontal scroll bar. A horizontal scroll bar can be used to quickly navigate horizontally through text and is useful for displaying long lines of text within a narrow text area.

### Enable (Label, Input Text Area)

Select this option to attach a horizontal scroll bar to the text area. This scroll bar will always be shown.

### Disable (Label, Input Text Area)

Select this option when a horizontal scroll bar is unnecessary or not preferred.

**Auto Hide (Label, Input Text Area)**

Select this option to attach a horizontal scroll bar to the text area. This scroll bar will automatically hide itself when the length of each line fits within the width of the text area.

**Vertical Scroll Behavior**

This section lets you define the behavior of the vertical scroll bar. A vertical scroll bar can be used to quickly navigate vertically through text and is useful for displaying several lines of text within a short text area.

This option does not apply to input text.

**Enable (Label, Input Text Area)**

Select this option to attach a vertical scroll bar to the text area. This scroll bar will always be shown.

**Disable (Label, Input Text Area)**

Select this option when a vertical scroll bar is unnecessary or not preferred.

**Auto Hide (Label, Input Text Area)**

Select this option to attach a vertical scroll bar to the text area. This scroll bar will automatically hide itself when the height of all the lines of text fit within the height of the text area.

**Dynamic Visibility**

For information about dynamic visibility, see [“Dynamic Visibility”](#) on page 95.

**Specific to Input Text area****HTML**

Select the HTML check box to render the default text as HTML. The component will parse the default text as if it were HTML code and attempt to render it as an internet browser would.

The following HTML tags are supported: a href, b, font color, font face, font size, i, p, u

See the HTML reference section in the online help for a description of HTML and the supported tags.

# Appearance tab

## Common to all components

### Alignment

For information about the Alignment list, see [“Alignment” on page 97](#).

### Font

For information about font, see [“Font settings” on page 94](#).

## Common to some components

### Transparency (Input Text-0, Input Text-1, Input Text Area)

For information about the Transparency box, see [“Transparency” on page 96](#).

### Use Custom Color (Input Text-0, Input Text-1, Input Text Area)

When you select the Use Custom Color check box, the following options for customizing the colors of the text component are available:

- **Background Color**  
You can customize the color of the text component background.
- **Scroll Bar Color**  
You can customize the color of the thumb piece in the scroll bar.
- **Scroll Arrow Color**  
You can customize the color of the arrows in the scroll buttons.
- **Scroll Gutter Color**  
You can customize the color of the scroll bar gutters.

To customize a color, click the adjacent Color Selector button. For information about Color Selector buttons, see [“Color Selector button” on page 100](#).

### Wrap Text (Input Text Area, Label)

Select the Wrap Text check box to cause lines of text that are longer than the component width to wrap to the next line of the label. This option does not apply to input text.



## Specific to Label

### Numeric Format

For more information about the Numeric Format list, see [“Numeric Format” on page 98](#).

### Background

Use the following options to configure the appearance of the label background and borders:

- **Border**  
Use this option to specify which sides of the border are currently being adjusted by the Show Border, Border Color, and Weight options. The four sides of the label border - Top, Bottom, Left, and Right - can be adjusted independently by selecting the appropriate side. All four sides can be adjusted simultaneously by selecting All Sides.
- **Weight**  
For information about the Weight box, see [“Weight” on page 96](#).
- **Show Border**  
Select Show Border to display a border on the label, at the side specified by the Border list. To customize the border color, click the adjacent Color Selector button. For information about Color Selector buttons, see [“Color Selector button” on page 100](#).
- **Show Fill**  
Select the Show Fill check box to display a colored background behind the label. To customize the fill color, click the adjacent Color Selector button. For information about Color Selector buttons, see [“Color Selector button” on page 100](#).

### Text

#### Alignment

For information about the Alignment list, see [“Alignment” on page 97](#).

#### Wrap Text

Select the Wrap Text check box to cause lines of text that are longer than the component width to wrap to the next line of the label. This option does not apply to input text.

For more information about font settings, see [“Font settings” on page 94](#).





# Web Connectivity Component Reference

# 15

chapter

## Overview

This chapter discusses Properties panel features for the components in the Web Connectivity folder.

## General Tab

### Common to some components

#### Label

Use this option to set the label that will appear on the button. Type in the Label box, or click the adjacent cell selector button to select the label for the component.

For more information on the cell selector button, see [“Cell Selector button” on page 100](#).

**Note:** This option applies to all the Web Connectivity components but the External Slide Show component.

#### URL

Use this option to enter the Uniform Resource Locator (URL) link for the button. A URL is also referred to as a Web address. Type in the URL box or click the adjacent cell selector button to select the URL for the component. In the generated visualization, the URL associated with the button will update as the selected cell value changes. With this functionality, you can create one button that will link to many different pages depending on the state of the visualization.

For information on the cell selector button, see [“Cell Selector button” on page 100](#).

**Note:**

- “http://” is required for all URLs.
- The options in this section apply only to the following Web component:
  - URL Link Button

## Specific to the External Slide Show component

### URL (JPEG or SWF file)

Use this option enter the button label. Type in the URL box or click on the URL cell selector button to select the URL for the slide show. When the URL is bound to a spreadsheet cell, changes to the value of the cell will cause the Slide Show to load the image at the URL specified in the cell.

For information on the cell selector button, see [“Cell Selector button” on page 100](#).

**Note:** Progressive JPGs and JPGs with CMYK coloring (as opposed to the standard RGB coloring) are not supported.

Once the image has been loaded, the Slide Show will transition to the image using the defined transition parameters.

## Specific to URL Link Button component

### Window Options

Use the options in this section to choose where the link should be opened when the URL Link button is clicked.

#### **New Window**

Select this option to open the link in a new browser window.

#### **This Window**

Select this option to open the link in the same browser window. The current contents of the window will be replaced.

## Behavior tab

## Common to All components

### Dynamic Visibility

For detailed information about Dynamic Visibility, see [“Dynamic Visibility” on page 95](#).

## Common to some components

### Refresh on Load (All but External Slide Show, Live Office Connector)

Select this check box to refresh the data once the generated application is loaded.

**Note:** This option applies to all the Web Connectivity components except the following:

- External Slide Show

### Refresh on Interval

Select this check box to automatically refresh the data at a given interval. The interval is specified by the Refresh Interval.

**Note:** This option applies to all the Web Connectivity components except the following:

- External Slide Show

### Refresh Interval

Use this option to adjust the time (in seconds) between each automatic refresh. Enter the desired value.

**Note:** This option applies to all the Web Connectivity components except the following:

- External Slide Show

### Trigger Cell

**Note:** The options in this section apply to all the Web Connectivity components except the External Slide Show component.

Use this option to select a cell from the spreadsheet that can trigger the URL button. This feature allows another action within the visualization, such as a List Box selection, to trigger the button - as if the button itself was pressed. The button is triggered when the value of the underlying Trigger Cell has changed.

#### Trigger on Any Insert

The URL button is triggered anytime a component inserts into the underlying Trigger Cell.

#### Trigger on Change Only

The URL button is triggered when the value of the underlying Trigger Cell has changed.

## Specific to External Slide Show component

### Slide Show Behavior

Use the parameters in this section to control the timing and style of the transition.

#### Ease Type

Use this option to set the easing behavior of the transition. The following options are available:

- **Slow In**  
The transition will begin slowly and accelerate as it progresses.
- **Slow Out**  
The transition will begin quickly and slow down as it progresses.
- **Slow In and Out**  
The transition will begin slowly and increase in speed until the middle of the transition. The transition will then decelerate until it is finished.

#### Transition Type

Use this option to set the style of the transition between each slide.

#### Interval Time

Use this option to set the amount of time in between each frame of the animation. Enter the desired value in the text box, or use the up/down arrows to adjust the time.

**Note:** A smaller number is better for smoother transitions, while a larger number may be better for performance.

## Appearance tab

### Common to Some components

#### Position

.For detailed information about this option, see [“Position” on page 97](#).

#### Font

.For detailed information about this option, see [“Font settings” on page 94](#).

## Selected Text

Click the Selected Text color selector button to set the color of the label when the button is pressed.

For information on the color selector button, see [“Color Selector button” on page 100](#).

## Transparency

.For detailed information about this option, see [“Transparency” on page 96](#).

## Use Custom Color

Use this option to customize the color of various parts of a component.

## Default Fill

Click the Default Fill color selector button to change the background color of the button in its default state.

For information on the color selector button, see [“Color Selector button” on page 100](#).

## Selected Fill

Click the Selected Fill color selector button to change the background color of the button when it is clicked.

For information on the color selector button, see [“Color Selector button” on page 100](#).

# Specific to URL Link Button component

## Alignment

For detailed information about this option, see [“Alignment” on page 97](#).

## Show background

Select the Show Background check box to show a background with the URL link button. By clearing the Show Background check box, you can create a text-only link. You can also clear the check box and place the transparent URL button over an imported image to create a custom URL link button.



## Show Custom Color

Select the Show Custom Color check box to specify colors for the URL Link Button.

### Default Fill

Click the Color Selector button adjacent to Default Fill to specify a color for the URL Link Button background.

For information on the color selector button, see [“Color Selector button” on page 100](#).

### Selected Fill

Click the Color Selector button adjacent to Selected Fill to specify a color for the URL Link Button background when it is clicked.

For information on the color selector button, see [“Color Selector button” on page 100](#).





# Other Components Reference



# 16

chapter



## Overview

This chapter discusses Properties panel features for the components in the Selectors folder.

## General tab

### Common to some components

#### Title

This feature lets you set the title for the selected component. Use the Title box to manually enter the title for the component.

Alternatively, you can use the Title Cell Selector button to select the title from the spreadsheet. When the title is bound to the spreadsheet, changes to the value of the underlying spreadsheet cell will be reflected in the button label. For more information about Cell Selector buttons, see [“Cell Selector button” on page 100](#).

**Note:** This area applies to the following components only:

- Interactive Calendar
- Grid
- Panel Set

#### Label

Use the Label text box to manually enter the button label.

You can also use the Label Cell Selector button to select the button label from the spreadsheet. When the label is bound to the spreadsheet, changes to the value of the spreadsheet cell will be reflected in the button label. For more information about Cell Selector buttons, see [“Cell Selector button” on page 100](#).

**Note:** This area applies to the following components only:

- Local Scenario Buttons
- FSCommand Button

## Specific to the Interactive Calendar component

### Insert Data

Use the options in this section to define how the Interactive Calendar component will behave when a selection is made.

### Insert Option

Use this option to specify the structure of the data inserted when a selection is made.

### Insert Source Data in

Use this option to select the cell into which the day or date from the Interactive calendar will be inserted. For information about Cell Selector buttons, see [“Cell Selector button” on page 100](#).

## Specific to the Grid component

### Link to Cell

Use this option to select all data for the grid from the spreadsheet. The grid displays a value for each cell selected, and arranges them in the same order as the selection. Any change to the values of these cells is reflected in the corresponding grid values. Similarly, any change to the grid values is reflected across all other components linked to the corresponding cells.

## Specific to Trend Icon-0 and Trend Icon-1

### Data

Use the Data section to set the Data parameter for the Trend Icon. The value of the Data parameter determines which icon is displayed for the component:

Use the Data text box to manually enter the data value for the component.

You can also use the Cell Selector button to select the data value from the spreadsheet. For more information about Cell Selector buttons, see [“Cell Selector button” on page 100](#).

### Use Custom Color

Select the Use Custom Color check box to customize the colors for the various states of the trend icon. The following options for customizing colors are available:

- Positive Value Color

You can customize the color the trend icon changes to when its data value is greater than zero.

- **Value is Zero Color**  
You can customize the color the trend icon changes to when its data value is equal to zero.
- **Negative Value Color**  
You can customize the color the trend icon changes to when its data value is less than zero.

To customize a color, click the adjacent Color Selector button. For information about Color Selector buttons, see [“Color Selector button” on page 100](#).

## Specific to the Local Scenario Buttons component

### Label

Use the Label text box to manually enter the button label.

You can also use the Label Cell Selector button to select the button label from the spreadsheet. When the label is bound to the spreadsheet, changes to the value of the spreadsheet cell will be reflected in the button label. For more information about the Cell Selector button, see [“Cell Selector button” on page 100](#).

## Specific to the Panel Set component

### Layout

Use the Layout option to select what you would like your panel to look like. There are a variety of layouts to choose from.

### Title Bars

#### Show Title Bars

This check box determines whether a title appears on each frame of the Panel Set component.

- **Titles**  
You can use the Browse button or the Cell Selector button to indicate what title you want to appear for each frame on the Panel. If you use the Brown button you can type in the title manually. If you select the Cell Selector button, you can link the title to a cell in your Excel spreadsheet.

## Content

### Panel

Use the Panel list to select a panel to link objects to. Whatever panel you select here will take the characteristics that you specify in the content section.

#### Use JPGs or SWFs

- Embedded

Use the Embedded option to link a SWF file or JPEG to the Panel directly from your computer or a network location. Click the Import button adjacent to the Embedded option to navigate to your files.

- URL

Use the URL option to enter a URL location for the JPEG or SWF file that you want to link to the panel.

- Labels

Use the Labels option to add a label to some or all of the objects that you link to a particular panel. If you use the Brown button you can type in the label manually. If you select the Cell Selector button, you can link the label to a cell in your Excel spreadsheet.

## Behavior tab

### Common to All components

#### Dynamic Visibility

For detailed information about Dynamic Visibility, see [“Dynamic Visibility” on page 95](#).

### Specific to the Interactive Calendar component

#### Calendar Defaults and Ranges

Use this set of options to control the sound, default date and date range for the Interactive Calendar component.

#### Sound Enabled

Check the Sound Enabled box to enable sound for the selected component.

## Use Current Date

Use this option to control the default date for the Interactive Calendar component. Selecting this option means that the Interactive Calendar component will always load with the current date. Unselecting this option requires you to enter a default data and enables the Default Month, Default Year and Default Day entry fields.

- **Default Month**  
Use this option to specify the default Month for the Interactive Calendar component.
- **Default Year**  
Use this option to specify the default Year for the Interactive Calendar component.
- **Default Day**  
Use this option to specify the default Day for the Interactive Calendar component.

## Use Calendar Limits

Use this option to control the date range for the Interactive Calendar component. Selecting this option requires you to specify the scroll range and enables the Start Month, Start Year, End Month and End Year entry fields. Unselecting this option means that the Interactive Calendar component will allow the user to scroll through all dates.

### Start Month

Use this option to specify the Start Month for the Interactive Calendar component.

### Start Year

Use this option to specify the Start Year for the Interactive Calendar component.

### End Month

Use this option to specify the End Month for the Interactive Calendar component.

### End Year

Use this option to specify the End Year for the Interactive Calendar component.

## Specific to the Grid component

### Scale Behavior

Use the options in this section to define the behavior of lower and upper limits. These limits are applied to every item in the grid.



Limits can be used to prevent the user from manually setting the grid items to certain values.

### Lower Limit Behavior

Use this option to set the Lower Limit Behavior for the component. Choose from the following:

- **Fixed** - The user cannot set the grid items to values less than the Minimum Value.
- **Open** - The user can set the grid items to any value that does not conflict with the Upper Limit.

### Upper Limit Behavior

Use this option to set the Upper Limit Behavior for the component. Choose from the following:

- **Fixed** - The user cannot set the grid items to values greater than the Maximum Value.
- **Open** - The user can set the grid items to any value that does not conflict with the Lower Limit.

### Minimum Value

Minimum Value is the Lower Limit and is available only when the Lower Limit Behavior is fixed. Enter the desired value in the text box, or use the up/down arrows to adjust the value.

### Maximum Value

Maximum Value is the Upper Limit and is available only when the Upper Limit Behavior is fixed. Enter the desired value in the text box, or use the up/down arrows to adjust the value.

### Increment

Grid item values that are manually set are rounded to the Increment number, allowing restricted input for quantities that require specific increments, such as dozens.

Numbers can also be made more readable by using the Increment to round to a specific digit. Enter the desired value in the text box, or use the up/down arrows to adjust the value.

## Play Options

### Show Play Button

The Show Play Button check box controls the visibility of the play button for the component.

### Auto Rewind

The Auto Rewind check box controls whether the play sequence for the component automatically rewinds when the Xcelsius visualization is run in its interactive format.

### Auto Replay

The Auto Replay check box controls whether the play sequence for the component automatically replays when the Xcelsius visualization is run in its interactive format.

### Sound Enabled

Select the Sound Enabled check box to enable sound for the component.

## Interaction Options

### Input Disabled

Check Input Disabled to disable runtime manipulation of the values in the grid.

**Note:** Regardless of this option, input is disabled for all grid items linked to Excel cells with formulas.

### Mouse Sensitivity

Use this setting to determine how sensitive the value of the component is to pointer movements. Higher sensitivity settings are beneficial when the value of the component needs to span a large range, while lower settings permit more granular manipulation of the value.

### Scroll Behavior

Use the Scroll Behavior options to specify how users will adjust the values of the component.

- **Manual:** The value of the cells will be controlled by manually dragging the mouse. When the mouse is dragged up or down, the value is adjusted by an amount approximate to the distance dragged. Dragging up increases the value of the component. Dragging down decreases the value of the component.

- **Automatic:** The value of the cells will be controlled by dragging and holding the mouse above or below the cell. The value will automatically and continually be adjusted as long as the mouse button remains down. If the mouse is above the cell, the value increases. If the mouse is below the cell, the value decreases. The farther away the mouse is from the value display, the faster the value will change.

## Specific to the Panel Set component

### Behavior Options

#### **Maximized Enabled**

Select this option to allow the user to expand a single Panel so that it covers the other panels and then minimize it again so it returns to its original size. This feature is useful when you want to emphasize different sets of data at different times during a presentation.

### Default Options

#### **Panel**

Select which panel you want to set the default option for.

#### **Default Selection**

Select which file you want to appear in the panel you selected when the visualization is launched.

### Slide Behavior

#### **Friction**

Adjust the Friction scale to control the friction of the panel behavior as the user selects different files to appear in each panel.

# Appearance tab

## Common to some components

### Show Title

This option controls the visibility of the title for the selected component. When you select the Show Title check box, the following options for customizing the appearance of the title become available:

- Position  
For information about this option, see [“Position” on page 97](#).
- X Shift  
For information about this option, see [“X Shift” on page 96](#).
- Y Shift  
For information about this option, see [“Y Shift” on page 97](#).
- Font Settings  
For information about this option, see [“Font settings” on page 94](#).

**Note:** Show Title applies to the following components only:

- Interactive Calendar
- Grid
- Panel Set

## Specific to the Interactive Calendar component

### Titles

#### Month

With the following options, you can configure the appearance of the month label for the selected component:

- Position  
For information about the Position list, see [“Position” on page 97](#).
- Font Settings  
For information about the Font Settings area, see [“Font settings” on page 94](#).

## Day of the Week

- Position  
For information about the Position list, see [“Position” on page 97](#).
- Font Settings  
For information about the Font Settings area, see [“Font settings” on page 94](#).

## Date

With the options in this section you can configure the appearance of the date labels for the selected component:

- Position  
For information about this option, see [“Position” on page 97](#).
- Font Settings  
For information about this option, see [“Font settings” on page 94](#).

## Layout

Use the options in this section to configure the appearance of the Interactive Calendar component. Use the Color Selector button adjacent to each of the options listed here to change its color.

### Use Custom Color

You can customize colors for the following parts and states of the Interactive Calendar component:

- Cell Default
- Cell Over
- Cell Select
- Day Fill
- Day
- Month
- Arrow Default
- Button Default
- Arrow Down
- Button Down
- Disabled Arrow
- Disabled Button

To customize a color, click the adjacent Color Selector button. For information about Color Selector buttons, see [“Color Selector button” on page 100](#).

## Specific to the Grid component

### Titles

#### Value

Use the options in this section to configure the appearance of the value label for the selected component.

- Position  
For information about this option, see [“Position” on page 97](#).
- Font Settings  
For information about this option, see [“Font settings” on page 94](#).

### Layout

#### Use Custom Color

When you select the Use Custom Color check box, the following option for customizing the color of the grid component becomes available:

- Fill Color

To customize a color, click the adjacent Color Selector button. For more information about Color Selector buttons, see [“Color Selector button” on page 100](#).

#### Grid Spacing

Use the options in this section to control the amount of space between the grid cells:

- Vertical Spacing  
Vertical Spacing determines the amount of spacing above and below each value of the grid. Enter the desired vertical spacing in the text box, or use the up/down arrows to adjust the value.
- Horizontal Spacing  
Horizontal Spacing determines the amount of spacing to the left and right of each value of the grid. Enter the desired horizontal spacing in the text box, or use the up/down arrows to adjust the value.

## Specific to the Local Scenario Buttons component

### Text

Use the following options to customize the appearance of text in the component:

- **Alignment**  
For information about this option, see [“Alignment” on page 97](#).
- **Font Settings**  
For detailed information about this option, see [“Font settings” on page 94](#)
- **Selected Text**  
Use the Color Selector button adjacent to Selected Text to specify what color you want the button label text to be when the button is clicked by the user. For more information about the Color Selector button, see [“Color Selector button” on page 100](#).

### Background

Use the parameters in this section to customize the appearance of the button label.

#### Show Background

This option controls the visibility of the button background.

#### Show Custom Color

Select the Show Custom Color check box to customize colors for the following parts of the component:

- **Default Fill**  
You can customize the default color of the button.
- **Selected Fill**  
You can customize the color the button changes to when it is clicked.

To customize a color, click the adjacent Color Selector button. For more information about Color Selector buttons, see [“Color Selector button” on page 100](#).

## Specific to the Panel Set component

### Titles

#### Show Title

The Show Title check box controls the visibility of the component title. When you select Show Title, the following options for customizing the appearance of the title become available:

- Position  
For information about this option, see [“Position” on page 97](#).
- X Shift  
For information about this option, see [“X Shift” on page 96](#).
- Y Shift  
For information about this option, see [“Y Shift” on page 97](#).
- Font  
For information about this option, see [“Font settings” on page 94](#).

#### Title Bar Labels

The following options let you customize the appearance of the title bar labels:

- Alignment  
For information about this option, see [“Alignment” on page 97](#).
- Font  
For information about this option, see [“Font settings” on page 94](#).

#### Drop-down Labels

The following options let you customize the appearance of the drop-down labels:

- Alignment  
For information about this option, see [“Alignment” on page 97](#).
- Font  
For information about this option, see [“Font settings” on page 94](#).



- **Mouse Over Text**  
Use the adjacent Color Selector button to specify the color text appears when a user mouses over it. For information about Color Selector buttons, see [“Color Selector button” on page 100](#).
- **Selected Text**  
Use the adjacent Color Selector button to specify the color text appears when a user selects it. For information about Color Selector buttons, see [“Color Selector button” on page 100](#).

## Layout

### Transparency

You can use the Transparency box to set the background transparency. For information about this option, see [“Transparency” on page 96](#).

### Use Custom Color

When you select the Use Custom Color check box, the following options for customizing the colors of parts of the component are available:

- **Background**
  - **Panel Color**  
You can customize the color of the panel backgrounds.
  - **Backing Color**  
You can customize the overall background color.
  - **Title Bar Color**  
You can customize the color of the Panel title bars.
- **Button**
  - **Default Background**  
You can customize the background color for the arrow button that enables you to switch between objects within a panel, and the maximize button.
  - **Default Symbol**  
You can customize the color of the icons on the arrow and maximize buttons.

- **Selected Background**  
You can customize the color the button background changes to when the button is clicked.
- **Selected Symbol**  
You can customize the color the icons on the arrow and maximize buttons changes to when these buttons are clicked.
- **Label Background**
  - **Default**  
You can customize the color of the label background.
  - **Mouse Over**  
You can customize the color the label background changes to when a user mouses over a label.
  - **Selected**  
You can customize the color the label background changes to when a user clicks the label.
- **Scroll Bar**
  - **Bar Color**  
You can customize the color of the scroll bars.
  - **Gutter Color**  
You can customize the color of the scroll bar gutters.
  - **Arrow Color**  
You can customize the color of the scroll bar arrows.

To customize a color, click the adjacent Color Selector button. For information about the Color Selector button, see [“Color Selector button” on page 100](#).



# Supported Excel Functions



# 17

chapter



# Supported Excel Functions

This chapter contains a list of the Microsoft Excel functions that Xcelsius supports.

Supported Excel Functions		
ABS	ACOS	ACOSH
AND	ASIN	ASINH
ATAN	ATAN2	ATANH
AVEDEV	AVERAGE	AVERAGEA
CEILING	CHOOSE	COMBIN
CONCATENATE	COS	COSH
COUNT	COUNTA	COUNTIF
DATE	DATEVALUE	DAVERAGE
DAY	DAYS360	DB
DCOUNT	DCOUNTA	DDB
DEGREES	DEVSQ	DGET
DMAX	DMIN	DOLLAR
DPRODUCT	DSTDEV	DSTDEVP
DSUM	DVAR	DVARP
EDATE	EOMONTH	EQUALS
EVEN	EXP	EXPONDIST
FACT	FALSE	FISHER
FISHERINV	FIXED	FLOOR
FORECAST	FV	GEOMEAN
HARMEAN	HLOOKUP	HOUR
IF	INDEX	INT
INTERCEPT	IPMT	IRR
ISBLANK	KURT	LARGE
LN	LOG	LOG10
MATCH	MAX	MEDIAN
MIN	MINUTE	MIRR

Supported Excel Functions		
MOD	MODE	MONTH
NETWORKDAYS	NORMDIST	NORMINV
NORMDIST	NORMSINV	NOT
NOW	NPER	NPV
ODD	OR	PI
PMT	POWER	PPMT
PRODUCT	PV	RADIANS
RAND	RATE	ISBLANK
ROUND	ROUNDDOWN	ROUNDUP
SECOND	SIGN	SIN
SINH	SLN	SMALL
SQRT	STANDARDIZE	STDEV
SUM	SUMIF	SUMPRODUCT
SUMSQ	SUMX2MY2	SUMX2PY2
SUMXMY2	SYD	TAN
TANH	TEXT	TIME
TIMEVALUE	TODAY	TRUE
TRUNC	VALUE	VAR
VDB	VLOOKUP	WEEKDAY
WEEKNUM	WORKDAY	YEAR
YEARFRAC		



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