Top Ten Best Practice Tips

1. Start Fresh
2. Mock It Up
3. Summarize Data
4. Minimize Excel Functions
5. Create a Company-Wide Labeling System
6. Maximize Interactivity
7. Maximize Real Estate using Selectors & Dynamic Visibility
8. Enhance Presentation
9. Automate with External Data Sources
10. Export to Test in Real World Environment
Why Xcelsius?

- Summary data
- Charts & Graphs
- Single Value Components
- Interactive
- Easy to Use
- Connectivity for automated refresh of data
Start Fresh
Start Fresh

▶ Start with an Empty Spreadsheet
  ▪ Avoids importing in unsupported functions or plug-ins
  ▪ Minimizes the data to what you need to see
  ▪ Ability to organize the data using “Excel for Xcelsius” Best Practices
Excel Features **NOT** Supported in Xcelsius 2008:

- Macros
- Conditional Formatting
- Pivot Tables
- Filters
- Connectivity
- Add-Ins
Mock It Up
Design on Paper

- Create a rough design on paper
  - Speeds the design process when creating within Xcelsius
  - Ability to use the paper design as a sign off
Create an Xcelsius Mock Up

- Create a template of the design using the components and visibility with dummy data
  - Use for a second level of approvals on concept and design
  - Use to iron out any potential issues
  - Use to organize your data in the best way to accommodate the functionality of the components
  - Use to test interactivity of components & determine if more or less is necessary
Best Practice Tip #3

Summarize Data
Core functionality of Xcelsius is to visually represent summarized data in an interactive way:
- Too much data slows the dashboard
- Makes the dashboard unmeaningful
- Should be able to quickly glance at the dashboard and gain immediate knowledge
Consider Using Open Document URL to drill into a more detailed report in Web Intelligence or Crystal Reports

**General Open Document Syntax:**

**Example:**

Drill Down to a Webi Report

Drill Down to Webi Report Functionality using Open Document URL

<table>
<thead>
<tr>
<th>State</th>
<th>Sales revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>California</td>
<td>$7,472,569</td>
</tr>
<tr>
<td>Colorado</td>
<td>$2,060,275</td>
</tr>
<tr>
<td>DC</td>
<td>$2,961,950</td>
</tr>
<tr>
<td>Florida</td>
<td>$1,879,159</td>
</tr>
<tr>
<td>Illinois</td>
<td>$3,022,968</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>$1,203,707</td>
</tr>
<tr>
<td>New York</td>
<td>$7,582,221</td>
</tr>
<tr>
<td>Texas</td>
<td>$10,117,684</td>
</tr>
</tbody>
</table>

Drill Down Webi Report

<table>
<thead>
<tr>
<th></th>
<th>Los Angeles</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>California</td>
<td></td>
<td>$982,637</td>
<td>$1,581,616</td>
</tr>
<tr>
<td>California</td>
<td></td>
<td>$721,574</td>
<td>$1,201,064</td>
</tr>
</tbody>
</table>
Minimize Excel Functions
Minimize

- Keep the data and logic to a minimum within Excel

- How?
  - Use no more formulas than necessary –
    - Too Many Formulas? Push processing to data source. Or consider calling external data based on selections.
  - Use simple over complex formulas
  - Reference base cell rather than reference cell
  - Remove Dummy Data used at Design Time

- Why?
  - Decreases the file size
  - Speeds up the interactivity (calculation time slows interactivity)
  - Minimizes the time and work necessary
  - Minimizes amount of time to load the SWF file
Organize Your Data

- Use INSERT ROW or COLUMN or FILTERED ROWS instead of Match and Index functions in Excel

- Alleviates the need for complex lookup logic
Still Too Many Formulas?

- Consider an XML Data Source Cache like InfoBurst XDS!!!
Create a Labeling System
Utilize Good Labeling Practices

- **Bad Labeling**

- **Good Labeling**

  - Color Code with Consistent Colors
  - Create Legend Tab
  - Title and Label cells
  - Group Like Elements - Labels Tab
Develop Consistency

- Develop a Labeling Norm within your organization

- For example:
  - Destination Cells = **Yellow**
  - Calculation Cells = **Pink**
  - External Data Cells = **Green**
  - Labels = **Red Text**
Maximize Interactivity
Enhance Interactivity

Core functionality of Xcelsius is Interactivity

- Selectors
- Drill Down Functionality on Charts
- Interactive Maps
- Customized Components using Images
- Drill Down to Web Intelligence or Crystal Reports Detail
- Single Value Components
- Animation
- Alerters on Charts, Maps, Single Value, Selectors
- Create Help with Toggle Button or Icon Components
- Percent of Max Value
- Percent Alerts: Bindable Thresholds
- Improved UI
  - Color Picker
  - Add / Remove Thresholds
  - Changing Thresholds
- Auto Colors
  - Gradients
- Alerts in Selectors
ALERTS

- Improved UI
  - Color Picker
ALERTS in Selectors

- Using the existing alert methodology, index based selectors allow for the configuration of alert icons for each label
- Ability to show icons only for applicable labels
**ALERTS in Selectors**

- Use of Alerts for a scalable method for presenting alert icons to notify users where to click – providing context
- Use Alerts for tabular presentation of measures (scorecard view)

<table>
<thead>
<tr>
<th>Measures</th>
<th>Actual</th>
<th>Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Sales</td>
<td>$2,159,658</td>
<td>$1,950,000</td>
</tr>
<tr>
<td>- North</td>
<td>$324,324</td>
<td>$200,000</td>
</tr>
<tr>
<td>- South</td>
<td>$522,234</td>
<td>$500,000</td>
</tr>
<tr>
<td>- West</td>
<td>$324,543</td>
<td>$400,000</td>
</tr>
<tr>
<td>- East</td>
<td>$345,323</td>
<td>$300,000</td>
</tr>
<tr>
<td>- Northeast</td>
<td>$643,234</td>
<td>$550,000</td>
</tr>
<tr>
<td>Customer Satisfaction</td>
<td>92%</td>
<td>90%</td>
</tr>
<tr>
<td>Marketing Spend</td>
<td>$70,123</td>
<td>$63,000</td>
</tr>
<tr>
<td>- Online</td>
<td>$23,123</td>
<td>$20,000</td>
</tr>
<tr>
<td>- Print</td>
<td>$33,000</td>
<td>$30,000</td>
</tr>
<tr>
<td>- Programs</td>
<td>$14,000</td>
<td>$13,000</td>
</tr>
</tbody>
</table>
Custom Interactive Maps

Regional Sales and Growth

Monthly Sales (millions) West Region

YTD Growth

4%
Maximize Real Estate Using Selectors and Dynamic Visibility
Layout don’ts

Quarterly Total Sales

Monthly Total Sales
Break It Up

- Label Based Menu to Break Up Views
- Selectors to Break up busy charts
Break It Up

- Selectors to Break up busy charts
Enhance Presentation
A theme is a collection of object properties that change the look of your model.

Nine themes available from the Themes toolbar.

Each theme has different components.
COLOR SCHEMES

- Color schemes apply color settings for multiple objects
- Choose from a selection of built-in color schemes or create custom color schemes
- Users can create a custom color scheme from a copy of a built-in color scheme and then edit the copy.
- Advanced settings change colors for specific backgrounds, text, buttons, scroll bars, charts, single-value components, selectors and maps.
- Gradient, RGB or HSL
Busy designs

Total Sales

Product Sales

<table>
<thead>
<tr>
<th>Product</th>
<th>North Region</th>
<th>South Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Products</td>
<td>$389</td>
<td>$347</td>
</tr>
<tr>
<td>Computers</td>
<td>$105</td>
<td>$142</td>
</tr>
<tr>
<td>Laptops</td>
<td>$153</td>
<td>$293</td>
</tr>
<tr>
<td>Tablet PCs</td>
<td>$112</td>
<td>$179</td>
</tr>
<tr>
<td>Monitors</td>
<td>$369</td>
<td>$325</td>
</tr>
<tr>
<td>Scanners</td>
<td>$321</td>
<td>$286</td>
</tr>
</tbody>
</table>
Charts Presentation

- Choose Right Chart for the job
- Label Size for Readability
- Add Interactivity – Drill Down
- Enable Animation – if appropriate
Enhance Presentation

- **Tie Components to Cells rather than Hard Code**
  - Ability to make change in Excel and Utilize Formulas

- **HTML Formatting available on Text Components**
  - Ability to combine HTML formatting with dynamically generated text (from spreadsheet formulas)
  - text size, color, and messages that can quickly respond to every mouse move, click, or data value.

- **Enhance the Background**
  - Canvas Properties
  - New features for Rectangle components
    - multistage gradient and transparency control
  - New features for Image Components
    - new supported image formats

- **Include Print Button and Reset Button components**
Use check boxes to enhance the functionality of a chart legend.
Automate with External Data Sources
Connections
- XML Data Connections
- Web Service Connections
- QAAWS
- Flash Variables Connections
- FS Command
- Crystal Report Data
- Portal Data
- XML Maps
- Live Office
Export to Test in Real World Environment
### Publishing Options

<table>
<thead>
<tr>
<th>Raw File</th>
<th>SWF - Can be embedded into any Application that can utilize The Macromedia Flash Player.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise Deployment</td>
<td>BOE, MS SharePoint, HTML</td>
</tr>
<tr>
<td>Desktop Deployment</td>
<td>Word, Power Point, PDF, Email</td>
</tr>
</tbody>
</table>
Export and Test

- Export and Test your Visualization outside of Xcelsius
  - Ability to see real world view of the dashboard
  - Address potential security issues
  - Test connectivity
Trust the SWF

- **Flash Player Security**

  If you export to Microsoft PowerPoint, Microsoft Word, HTML, or to your desktop to run the SWF, you may find the SWF does not work if you try to retrieve data or try to navigate to a Web page because of the Adobe Flash security restrictions.

  To run this SWF on your desktop, you need to make it trusted, so it can access Web sites or local data.

  
  *Note: You can make a SWF trusted using the Global Settings Manager (if you have Internet access) or with a FlashPlayerTrust configuration file.*
Flash Player Security

To make a SWF trusted using the Global Settings Manager:

1. Run the SWF.
2. Right-click on the SWF to see a context menu and select Settings...
3. Select the Privacy tab.
4. Click Advanced... (opens in a new window).
5. Select Global Security Settings Panel (in the Table of Contents).
6. Add this SWF as trusted location.
7. Close the browser and reload the SWF.
Running a SWF hosted on a web server requires a cross domain policy file.

- If you host your SWF on a Web server, make sure that any Web server you need to connect to for live data has a cross-domain policy file in the Web server root (the location of the root folder differs for each Web server).
- If you do not, then you may not be able to connect to the Web server to get data when you run the SWF hosted on your Web server.
- The cross-domain policy file controls which SWFs running in which domains can access your Web server.
Example Cross Domain Policy File

- <?xml version="1.0"?>
- <!DOCTYPE cross-domain-policy SYSTEM "http://www.macromedia.com/xml/dtds/cross-domainpolicy.dtd">
- <cross-domain-policy>
- <allow-http-request-headers-from domain="*" headers="*" secure="false" />
- <allow-access-from domain="*" secure="false" />
- </cross-domain-policy>

- Note: The <allow-http-request-headers-from ... /> line in Figure 5 is a new cross-domain policy requirement for Flash Player 9 onwards.
Top Ten Best Practice Tips

1. Start Fresh
2. Mock It Up
3. Summarize Data
4. Minimize Excel Functions
5. Create a Company-Wide Labeling System
6. Maximize Interactivity
7. Maximize Real Estate using Selectors & Dynamic Visibility
8. Enhance Presentation
9. Automate with External Data Sources
10. Export to Test in Real World Environment
Setting up for Success

- Do not run Excel while using Xcelsius. If running Excel, open after opening Xcelsius.
- Run 1 instance of Xcelsius at a time. If you need to copy and paste components between Xcelsius instances do so and then close the second instance of Xcelsius.
- If Xcelsius crashes for whatever reason, open the task manager CTR + ALT + DELETE and shot down any Excel processes before re-starting Xcelsius.
- Turn Excel auto save off while working heavily inside Xcelsius. In Excel 2003, this is located in Tools>Options>Save. In Excel 2007 this is located under Excel Options.
- Shut down all Excel add-ins or any other applications that may use Excel or Office.
- Save and version your dashboards every time you make major changes. It never hurts to have extra versions sitting around.
- Save Early, Save Often!
# XCELSIUS 2008 PRODUCT COMPARISON MATRIX

<table>
<thead>
<tr>
<th>Feature</th>
<th>Engage</th>
<th>Engage Server</th>
<th>Enterprise</th>
</tr>
</thead>
<tbody>
<tr>
<td>XML and Web Services live data connectors</td>
<td>•</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td>Connectivity to Adobe LiveCycle Data Services</td>
<td>•</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td>and Microsoft Reporting Services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Microsoft and IBM portal integrations</td>
<td>•</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td>Flynit automatic Web service generator</td>
<td>•</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BusinessObjects platform connectivity and integration</td>
<td>•</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td>Basic data visualization components</td>
<td>•</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td>Export to Adobe PDF and Microsoft Office</td>
<td>•</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td>Add-on capability</td>
<td>•</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td>Dashboard creation components,</td>
<td>•</td>
<td>•</td>
<td>•</td>
</tr>
<tr>
<td>export to Adobe Flash and the Web</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>