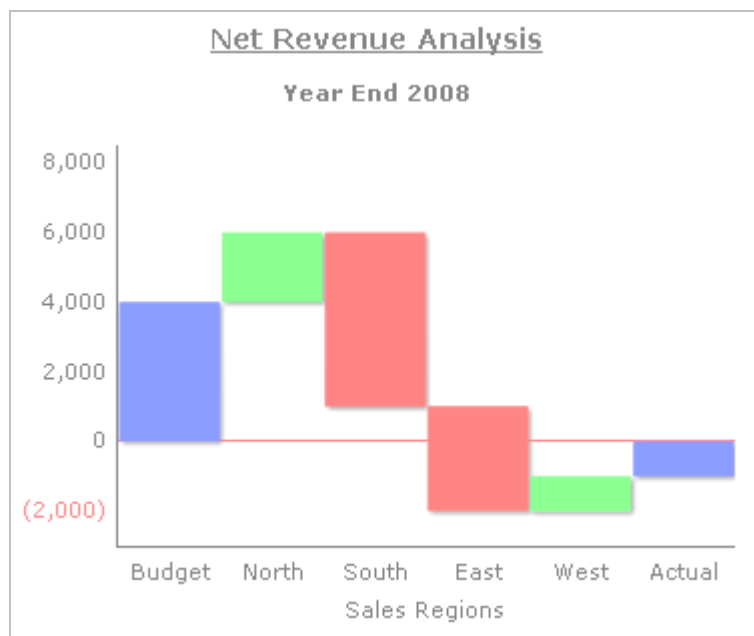


Waterfall Chart

Xcelsius Add-On Component

User Guide



System Requirements

The following are the minimum system requirements for the Waterfall Chart Add-On:

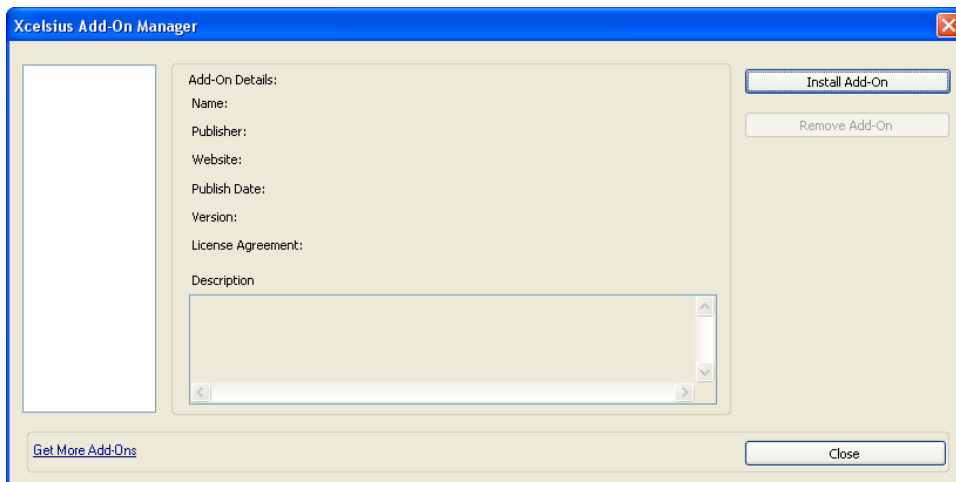
Xcelsius™: Xcelsius SP1 FP3

Adobe: Flash Player 9

Disk Space: 1 MB

Installation

1. Download the latest version of the Waterfall Chart adding from www.reportex.co.uk and unzip the file to a location on your hard disk, or network share drive.
2. Open Xcelsius™ and click File > Manage Add-Ons
3. In the Xcelsius™ Add-On manager click Install Add-On (Note if you are upgrading vrom v1.0 then you must uninstall that version first)



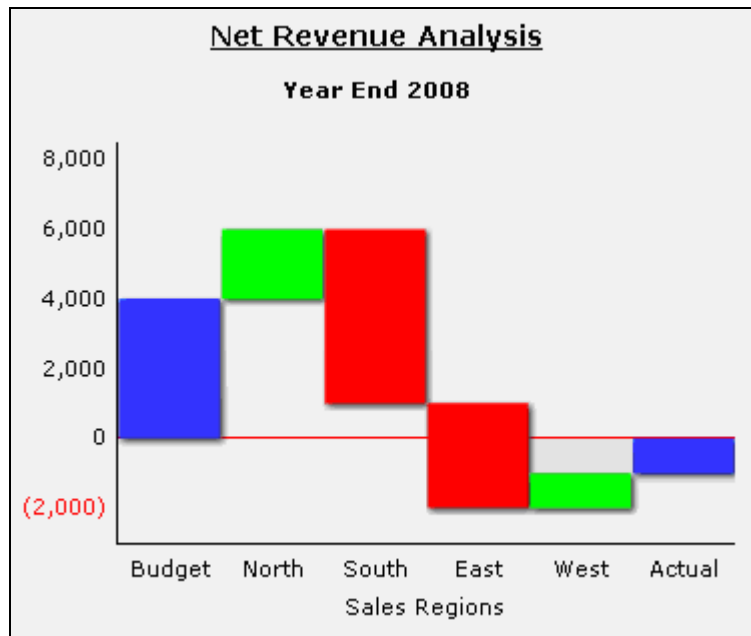
4. Navigate to the directory and select the WaterfallChart.xlsx or WaterfallChartTrial.xlsx, click Open.
5. Close the Xcelsius™ Add-On Manager and click Exit, or Save and Exit if needed.
6. Re-Open Xcelsius™ and the Waterfall Chart add-On will be available for use within the new Reportex Category.



Waterfall Chart Component Guide

Overview

The Waterfall Chart is a favourite amongst Finance Departments and Business Analysts in displaying the relationship between a starting point and its end point based on the variances of the constituent parts.



	Start	North	South	East	West	End
Budget	4,000	9,000	15,000	12,000	8,000	
Actual		11,000	10,000	9,000	9,000	(1,000)
Variance	4,000	2,000	(5,000)	(3,000)	1,000	(1,000)

In this example the Budget position for the year ended 2008 for Net Revenue is 4,000, however the Actual year end 2008 Net Revenue is **(1,000)**. So the question is how did we get from the Budget value to the Actual value? A Waterfall Chart shows this information with values based on variances. In the example we can see that the Northern region has a positive variance of 2,000 (not to the overall budget of 4,000 but to its own regional variance, budget 9,000, Actual 11,000 to give the 2,000 positive variance). We can also see that the Southern region has a negative variance of **(5,000)** and so reduces the overall revenue down from 6,000 to 1,000. The same process is repeated for the East and West regions which overall gives the Actual Net Revenue figure of **(1,000)**.

Properties Sheet Guide

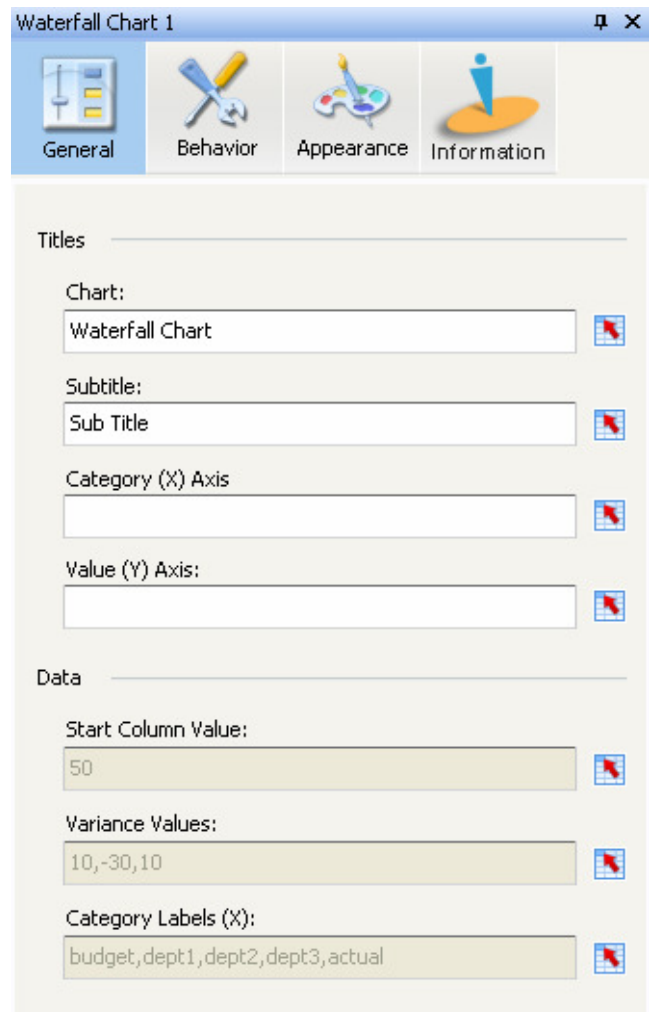
General Tab

Titles

- Chart – The Charts Title
- Subtitle – The Charts Subtitle
- Category (X) Axis – The Horizontal Axis Title
- Value (Y) Axis – The Vertical Axis Title

Data

- Start Column Value: – This is the value for the first column in the chart. It must be bound to a cell.
- Variance Values: – This is the range of variance values only. Must be bound to a contiguous range of cells. The Component will automatically calculate the end value.
- Category Label (X): – This is the range of data labels to display and must include the start and end column labels. Must be bound to a contiguous range of cells.



Waterfall Chart 1

General Behavior Appearance Information

Titles

Chart:
Waterfall Chart

Subtitle:
Sub Title

Category (X) Axis

Value (Y) Axis:

Data

Start Column Value:
50

Variance Values:
10,-30,10

Category Labels (X):
budget,dept1,dept2,dept3,actual

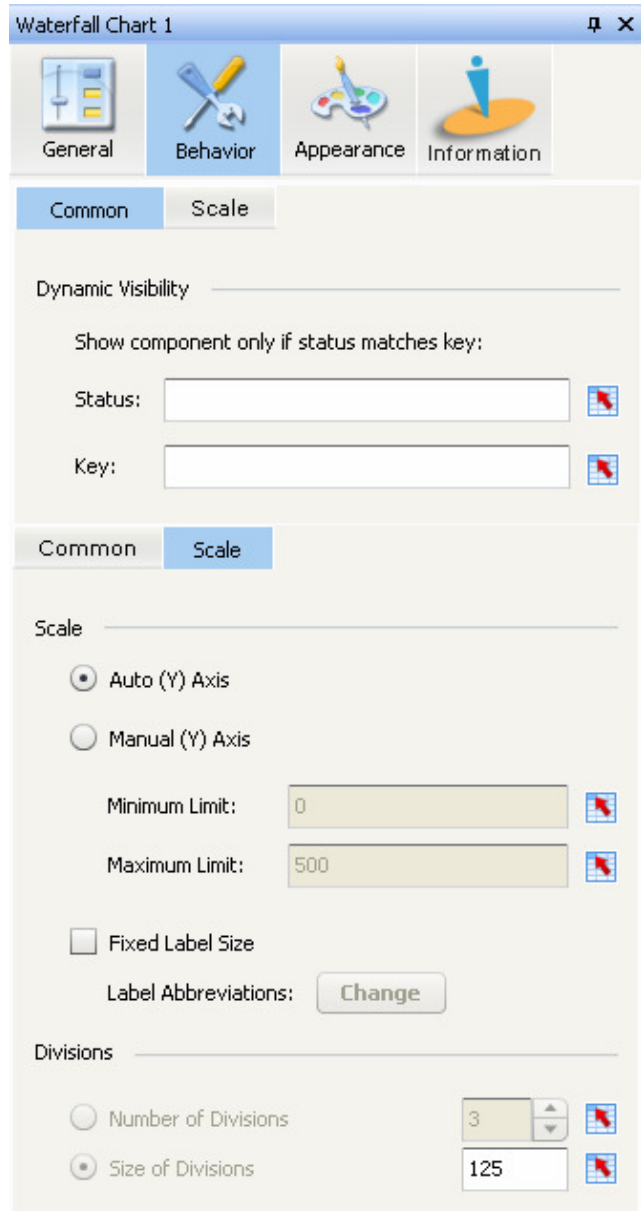
Behavior Tab

Common sub-tab

- Dynamic Visibility
 - Status: - Sets the status of the components visibility, can be bound to a cell.
 - Key: - Sets the key to check against the status, can be bound to a cell.

Scale sub-tab

- Auto (Y) Axis – Automatically adjusts the scale of the chart to fit the data values.
- Manual (Y) Axis – Enables set values to be used for the scale by setting:
 - Minimum Limit: - Static value or bound to a cell
 - Maximum Limit: - Static value or bound to a cell
- Fixed Label size – Check this box to summarise the Y-Axis values into Thousands, Millions, Billions or Trillions. Click 'Change' to change the suffix labels.
- Divisions – Only used when Manual Y-Axis option is selected. Select the number of Divisions or the Size of the divisions.



The screenshot shows the 'Waterfall Chart 1' configuration window with the 'Behavior' tab selected. The 'Common' sub-tab is active, showing the 'Dynamic Visibility' section with 'Status' and 'Key' input fields. The 'Scale' sub-tab is also visible, showing the 'Scale' section with radio buttons for 'Auto (Y) Axis' (selected) and 'Manual (Y) Axis'. The 'Manual (Y) Axis' section includes 'Minimum Limit' (0) and 'Maximum Limit' (500) input fields, a 'Fixed Label Size' checkbox, and a 'Label Abbreviations' button. The 'Divisions' section has radio buttons for 'Number of Divisions' (3) and 'Size of Divisions' (125).

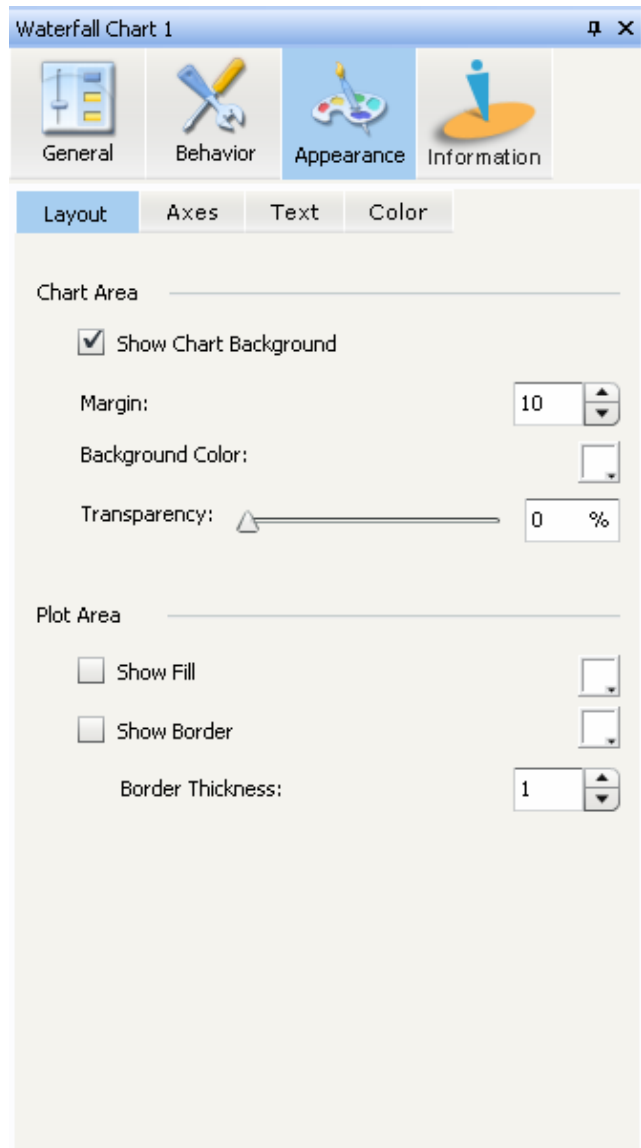
Appearance Tab

Layout sub-tab

- Show Chart Background – Show or hide the chart background.

If checked the following options are available:

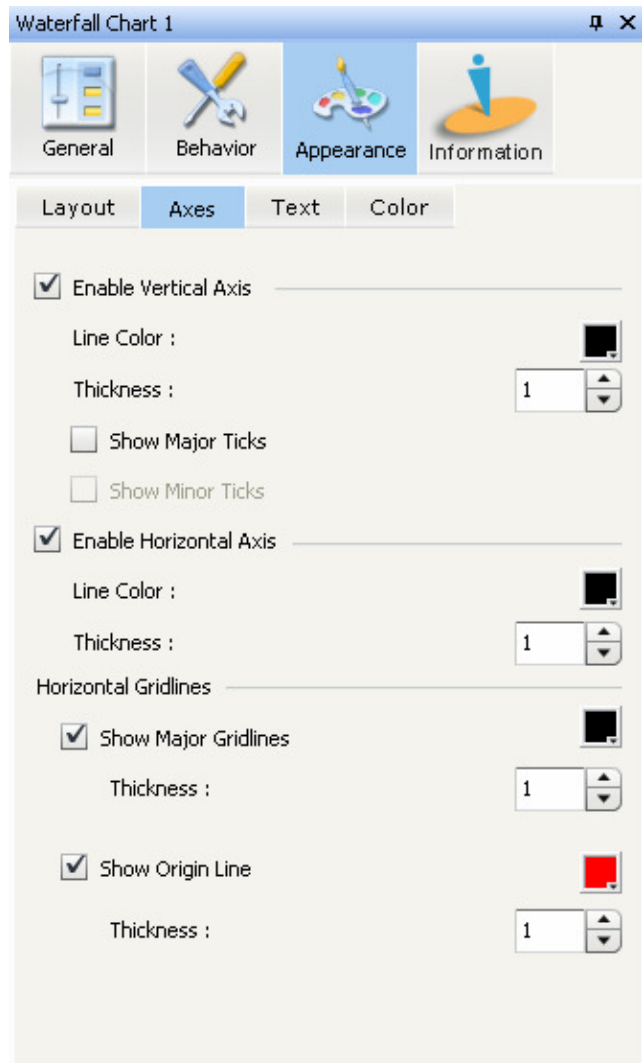
- Margin: – specifies the width of the margin from the component edges to the chart’s visual display.
- Background Color: – Specify the chart’s background color.
- Transparency: - Sets the chart’s background transparency from 0% (Opaque) to 100% (Transparent).
- Plot Area – Plot Area formatting properties:
 - Show Fill: - Set the Fill color
 - Show Border
 - Set the Border color
 - Border thickness: - Sets the Border’s thickness



Appearance Tab (cont...)

Axes sub-tab

- Enable Vertical Axis – Show or hide the Vertical Axis line. If checked the following options are available:
 - Line Color: - Sets the line's color.
 - Thickness: - Sets the Line's thickness.
 - Show/Hide Major Ticks
 - Show/Hide Minor Ticks
- Enable Horizontal Axis – Show/Hide the Horizontal Axis line. If checked the following options are available:
 - Line Color: - Sets the line's color.
 - Thickness: - Sets the Line's thickness.
- Horizontal Gridlines – Show/Hide the Major Horizontal If checked the following options are available:
 - Set the line's color
 - Thickness: - Sets the line's thickness
- Show/Hide the Origin Line (displays in red). Useful when dealing with negative numbers. If checked the following options are available:
 - Set the line's color
 - Thickness: - Sets the line's thickness



Appearance Tab (cont...)

Text sub-tab

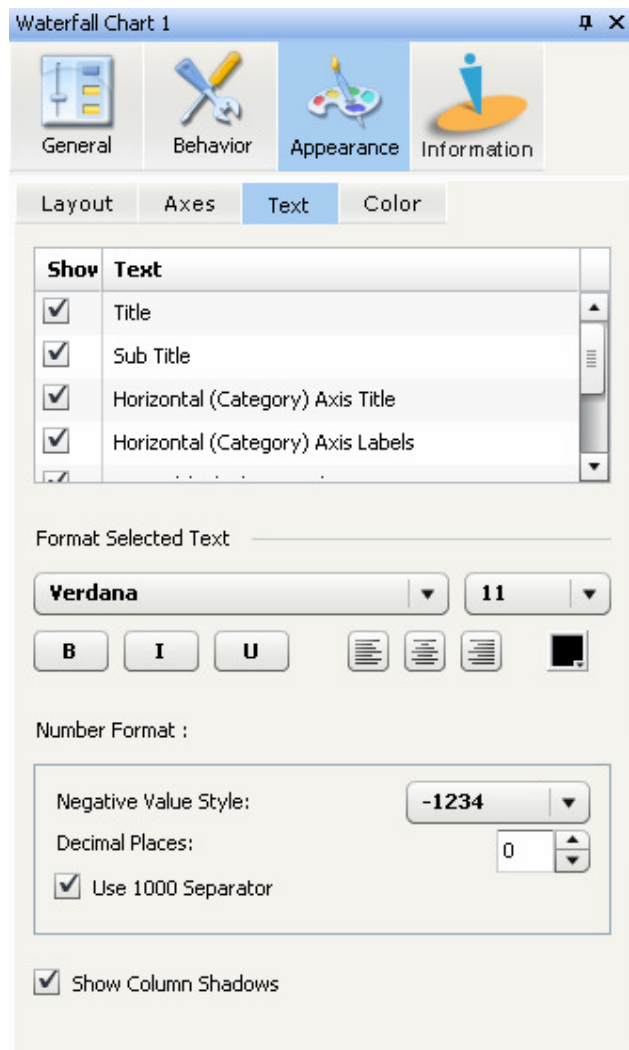
- Show/Hide the chart's text element from the selection list:
 - Title
 - Sub Title
 - Horizontal Axis Title
 - Horizontal Axis Labels
 - Vertical Axis Title *
 - Vertical Axis Labels
 - Mouse Over Values

- Format the text element's properties:
 - Font Face
 - Font Size
 - Bold
 - Italic
 - Underline
 - Align Left/Centre/Right
 - Font Color

- Number Format: - Applies to the numbers of the Vertical (Y) Axis
 - Negative Value Style: - With or without braces
 - Decimal Places: (0 to 4 dp)
 - Use 1000 separator - Sets a comma as the thousand separator.

- Show/Hide the Column Shadows

* - Note that when formatting the Vertical Axis Labels, the Vertical Axis Titles will take the same formatting as the Vertical Axis Labels. Use a separate Label box component if different Axis Title formatting is required.



Waterfall Chart 1

General Behavior Appearance Information

Layout Axes Text Color

Show	Text
<input checked="" type="checkbox"/>	Title
<input checked="" type="checkbox"/>	Sub Title
<input checked="" type="checkbox"/>	Horizontal (Category) Axis Title
<input checked="" type="checkbox"/>	Horizontal (Category) Axis Labels

Format Selected Text

Verdana 11

B I U [Align Left] [Align Center] [Align Right] [Text Color]

Number Format :

Negative Value Style: -1234

Decimal Places: 0

Use 1000 Separator

Show Column Shadows

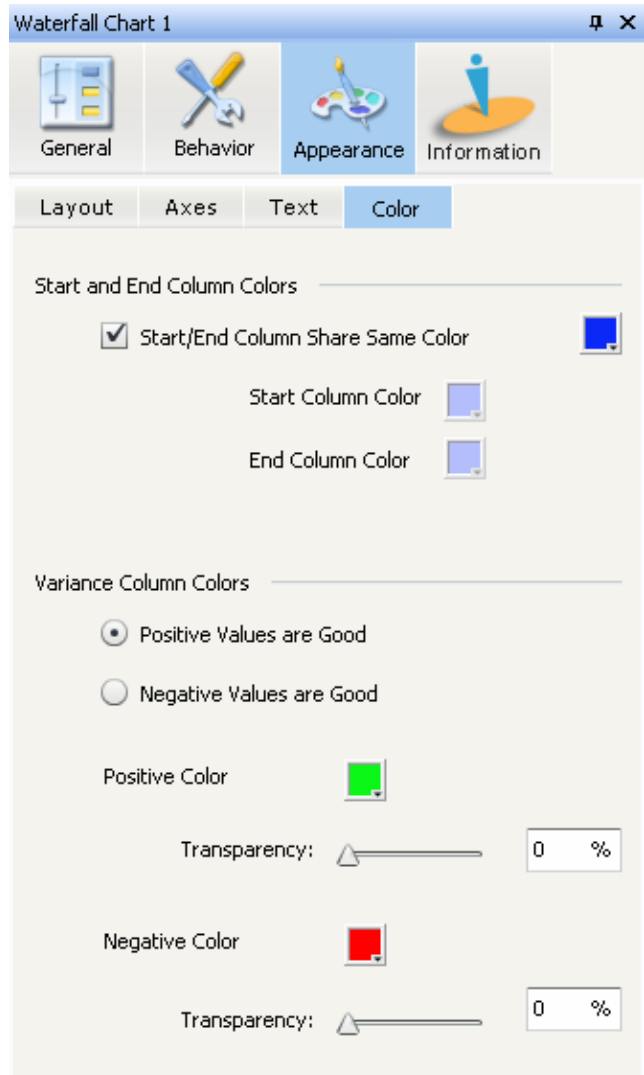
Appearance Tab (cont...)

Color sub-tab

- Start/End Column Share Same Color –
 - Set the Shared Color

When unchecked the start and end column colors are set independently.

- Variance Column Colors:
 - Positive Values are Good – denotes that Positive values default to Green and Negative values default to Red.
 - Negative Values are Good – denotes that Positive values default to Red and Negative values default to Green.
 - Positive Color – Change the Positive Value color and transparency from 0% (Opaque) to 100% (Transparent).
 - Negative Color – Change the Negative Value color and transparency from 0% (Opaque) to 100% (Transparent).



Information Tab

Displays the version number, and component Type, either Trial or Full.

Click on the links to visit the Reportex Ltd website or to email Reportex for further information.





Support

Component Support

Support contact details are available from the Reportex Ltd Website:

www.reportex.co.uk

Alternatively use the email address:

support@reportex.co.uk

General comments on the Waterfall Chart component or on this documentation can be sent to:

info@reportex.co.uk