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Crystal Xcelsius™ FOR DUMMIES®

Make interactive presentations from your spreadsheets

A Reference for the Rest of Us!®

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Michael Alexander
Microsoft Certified Application Developer

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Michael Alexander is a Microsoft Certified Application Developer (MCAD) with over 14 years experience consulting and developing office solutions. He is the author of several books and the principle contributor at www.datapigtechnologies.com , where he shares free Access and Excel tips to intermediate users. He currently lives in Frisco, Texas where he works as a Senior Program Manager for a top technology firm.

Dedication

For my wonderful family: Mary, Ethan, and Emma.

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Introduction

I like to pretend that I'm a young man, but then I remember that one of my first jobs was typing up orders on a Wang computer. For you spring chickens who don't remember Wang computers, let's just say they don't make them anymore. Anyway, my point is that I've been in the business world a long time. I remember the mad rush to invest in large data warehouses and enterprise reporting tools. These tools came with the promise of business intelligence, affectionately called *BI.* Business intelligence is what you get when you analyze raw data and turn that analysis into knowledge. BI can help an organization identify cost-cutting opportunities, uncover new business opportunities, recognize changing business environments, identify data anomalies, and create widely accessible reports. Unfortunately, data warehouse and enterprise tools of the past had analysis and reporting capabilities that were clunky at best and not very user-friendly. This left many business professionals using tools such as Lotus 1-2-3 and Excel to analyze and report data.

Fast-forward about a decade later, and you'll see that a lot has changed. The Internet is now a cornerstone of business, new technologies have emerged to enhance the quality and performance of Web reporting, and even the previously clunky BI tools can now provide analytical capabilities that are both robust and user-friendly. Nevertheless, even with all these advances in business

intelligence capabilities, most of the data analysis and reporting done in business today is still done by using a spreadsheet: that’s right, our old friend Excel, which has remained more or less unchanged for the last ten years. Make no mistake — no matter how advanced an IT manager thinks his enterprise system is, Excel is embedded somewhere in that organization’s data pipeline.

This is where Crystal Xcelsius enters the scene. Unlike other enterprise solutions, Crystal Xcelsius doesn’t try to replace Excel or to take away its need. Instead, Crystal Xcelsius works with Excel to create interactive visualizations by using Excel’s data and functionality. With Crystal Xcelsius, users no longer have to feel bad about using Excel in an environment that touts high technology. Crystal Xcelsius allows Excel users to turn their spreadsheets into professional looking dashboards, scorecards, what-if visualizations, or even highly polished PowerPoint presentations. The best thing about Crystal Xcelsius is that with its user-friendly click-and-drag interface, anyone can create highly compelling dashboards in minutes. So ignore SAP for a while. Close out your Crystal Reports, and log off of your Panorama and Cognos portals. Fire up the stalwart Excel and take an in-depth look at this fabulous new program called Crystal Xcelsius.

About This Book

The chapters in this book are designed to be standalone chapters that you can selectively refer to as needed. These chapters provide you with step-by-step walkthrough examples as well as instruction on the wide array of functionality that Crystal Xcelsius has to offer. As you move through this book, you will be able to create increasingly sophisticated dashboards using more advanced components. After reading this book, you will be able to

- Create basic dashboards with charts, gauges, and sliders.
- Add advanced functionality to your dashboards such as alerts, maps, and dynamic visibility.
- Create interactive business calculators and what-if analysis tools.
- Integrate Crystal Xcelsius models into PowerPoint presentations.
- Create Crystal Xcelsius–based Web pages.

The three versions of Crystal Xcelsius are Standard, Professional, and Workgroup. In this book, I focus on the components and functionalities of Crystal Xcelsius Standard and Professional. If you use Crystal Xcelsius Workgroup, you will find that much of the information found here still applies to your version. However, this book doesn’t cover the collaboration and the enterprise-level functionality of Crystal Xcelsius Workgroup.

Foolish Assumptions

I make three assumptions about you, the reader:

- Given that you're even reading this book, you've already bought and installed Crystal Xcelsius.
- You are a relatively experienced Excel user familiar with basic concepts, such as referencing cells and using formulas.
- You have enough experience with PowerPoint to add objects, resize objects, and run a presentation.

How This Book Is Organized

The chapters in this book are organized into five parts, each of which includes chapters that build on the previous chapters' instruction. As you go through each part, you will be able to build dashboards of increasing complexity until you're a Crystal Xcelsius guru.

Part I: Say Hello to Crystal Xcelsius

Part I is all about introducing you to Crystal Xcelsius. In Chapter 1, I share with you the various ways you can use Crystal Xcelsius as well as the core concepts that make Crystal Xcelsius components work. In Chapter 2, throw caution to the wind and create your first dashboard — without reading the instructions. At the end of Chapter 2, you will have a firm understanding of the fundamentals of using Crystal Xcelsius, including importing data, working with components, publishing your dashboard, and refreshing your data.

Part II: Getting Started with the Basics

In Part II, I take an in-depth look at some of the basic components that are key to any dashboard. In Chapter 3, I show you how Single Value components work and how to use them to build interactivity into your dashboards. In Chapter 4, I show you how to leverage alerts to enable conditional coloring in your components, allowing your audience to get an instant visual assessment on performance. Chapter 5 is all about creating charts in Crystal Xcelsius. I wrap up this part with Chapter 6, where I show you how to easily build menus and selectors into your dashboards with Selector components.

Part III: Getting Fancy with Advanced Components

In Part III, I go beyond the basics to take a look at some of the advanced components that Crystal Xcelsius has to offer. In Chapter 7, I demonstrate the different ways you can use Map components to add flair to your visualizations. In Chapter 8, I walk you through the basics of dynamic visibility and look at some examples of how dynamic visibility can help achieve focus on the parts of your dashboard that are important. Chapter 9 focuses on the advanced components and functions that are found only in the Professional version of Crystal Xcelsius, discussing how each can be used to enhance your visual models.

Part IV: Wrapping Things Up

Part IV focuses on the last two actions a user takes when wrapping up the production of a dashboard: formatting and distribution. Chapter 10 focuses on the functions and utilities that enable you to show off your artistic side and add your own style to your visual models. In Chapter 11, I show you just how easy it is to take your dashboards to market, and I share a few other tricks on how to share the data in a visual model.

Part V: The Part of Tens

Part V is the classic Part of Tens section found in every *For Dummies* title. The chapters here each present ten or more pearls of wisdom, delivered in bite-sized pieces. In Chapter 12, I share with you ten best practices that will help you design Excel models that allow you to go beyond simple dashboards. In Chapter 13, I share ten of my best Crystal Xcelsius tricks, making ordinary components do extraordinary things. Chapter 14 focuses on answering some of the questions that I hear most often. Chapter 15 covers real-world examples of Crystal Xcelsius in the workplace.

Lastly, the appendix at the end of the book contains an essay by Loren Abdulezer about the significance of the paradigm shift that Crystal Xcelsius represents.

Icons Used In This Book

Sometimes I have to talk about certain technical things in order to keep my guru mystique. These things are interesting but not crucial, so I mark them with this icon. You don't need to read them, but for some of the more tech-savvy of you, they may be useful.

Tips are suggestions to make your life easier. Skim these nuggets for timesavers, tricks, and just plain cool moves.

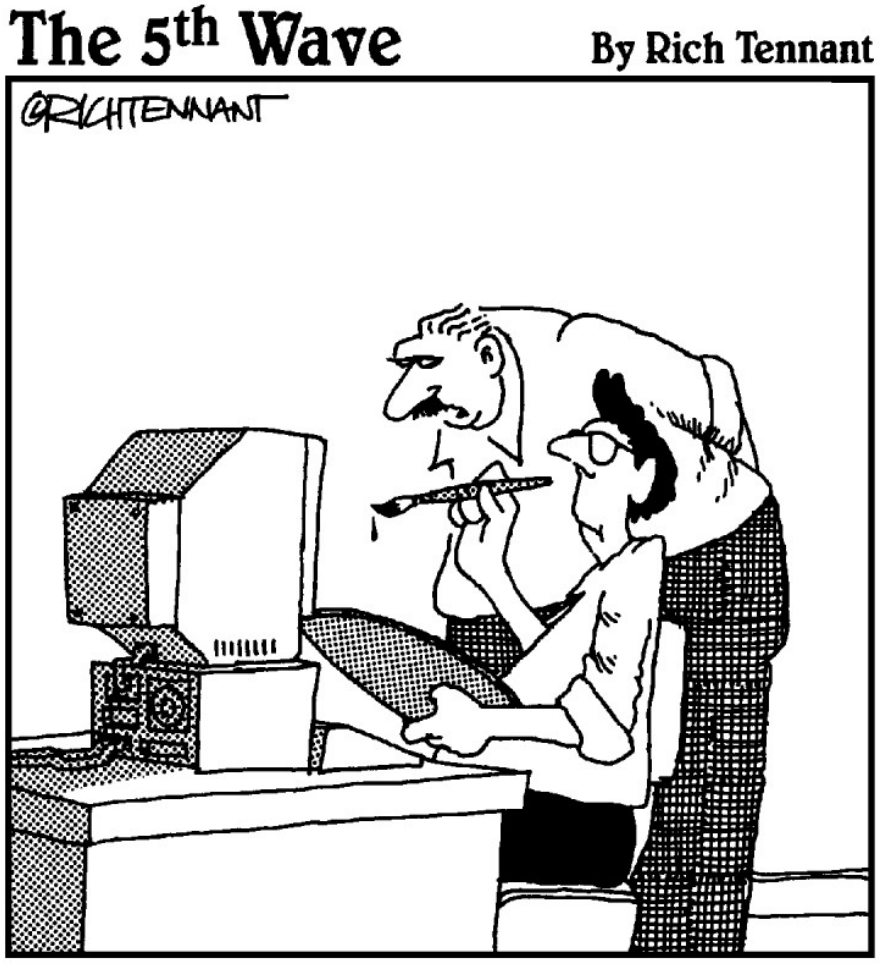
These notes denote info you ought to think about, but they're not going to cause a disaster if you don't pay attention.

Be sure to read text marked with this icon! If you do not follow a warning, bad things can happen: Puffs of black smoke might come out of your monitor, your workspace could be deluged by a plague of frogs, or your program simply won't work right.

This icon denotes subject matter about which you can find more on the World Wide Web. For the most part, the icon is used to point out examples you can download from this book's companion Web site at www.dummies.com/go/xcelsius .

Part I

Say Hello to Crystal Xcelsius



"Frankly, I'm not sure this is the way to enhance our data presentation."

In this part . . .

In this part, you are introduced to Crystal Xcelsius. In Chapter 1, I share with you the various ways you can use Crystal Xcelsius as well as the core concepts that make the Crystal Xcelsius components work. In Chapter 2, throw caution to the wind and create your first dashboard — without reading the instructions. By the end of this part, you should have a firm understanding of the fundamentals of creating dashboards in Crystal Xcelsius.

Chapter 1

Introducing Crystal Xcelsius

In This Chapter

- Overcoming static cling
- Seeing beyond fancy graphics
- Checking out Crystal Xcelsius under the hood

So here you are with this new software application — Crystal Xcelsius — in your hand, ready to read this book, hoping to see how to make some really cool dashboards that organize and present your data in a brilliant new way. Little do you know that you are on the cusp of a revolution. It's true! I sit here writing one of the first chapters ever written about Crystal Xcelsius, which is fast becoming a force to be reckoned with in the world of business intelligence.

Using cutting-edge technology, Crystal Xcelsius bridges the gap between data analysis and data presentation, empowering anyone who can point and click a mouse to create professional and compelling dashboards. Gone are the days of deferring to the local Excel guru to help analyze your data or calling the local PowerPoint guru to help you build your presentations. Crystal Xcelsius

simplifies even the most complex functionalities, enabling even a beginner to play the part of the guru, creating stunning presentations with just a handful of basic techniques. So as you sit there with your copy of Crystal Xcelsius, don't look so worried. Steady your hand, lift your head, and say with me, "I am the guru. I am the guru!"

This chapter is all about gaining some familiarity with Crystal Xcelsius before creating your first dashboard. Here, I give you an overview of the concepts behind Crystal Xcelsius, how Crystal Xcelsius works, and how you can use Crystal Xcelsius as an integral part of your daily operations.

Overcoming Static Cling

I love the TV show *Little House on the Prairie.* One of my favorite characters on the show is Doc Baker, who is the old country doctor fighting illness armed with nothing more than a stethoscope. (Sometimes I wonder just how effective he is with that stethoscope. I mean, how much information could he, or any other doctor in the 1880's for that matter, possibly gather with a stethoscope?) That's a long stretch from today, where technology provides doctors with an unprecedented amount of data with dynamic visualizations of the human body that are interactive, real-time, and 3-D. *Visualization* transforms data into a form that is comprehensible to the eye, allowing you to analyze data through the sense of sight.