



Fluence
Technologies

FluenceXL

- the new name for XLCubed

QuickStart Guide

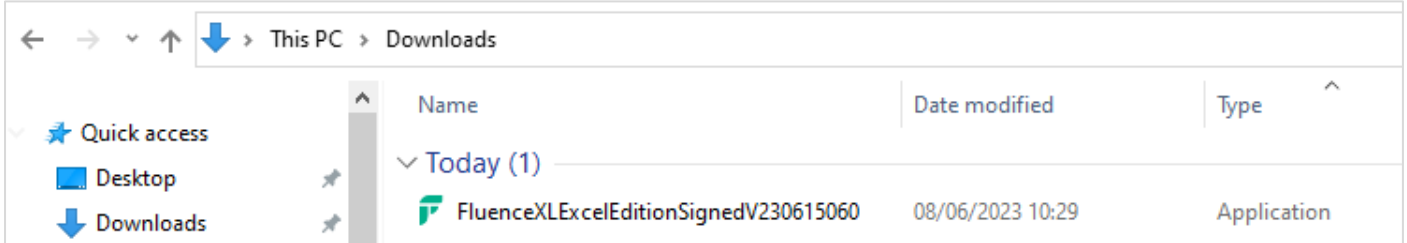
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Installation

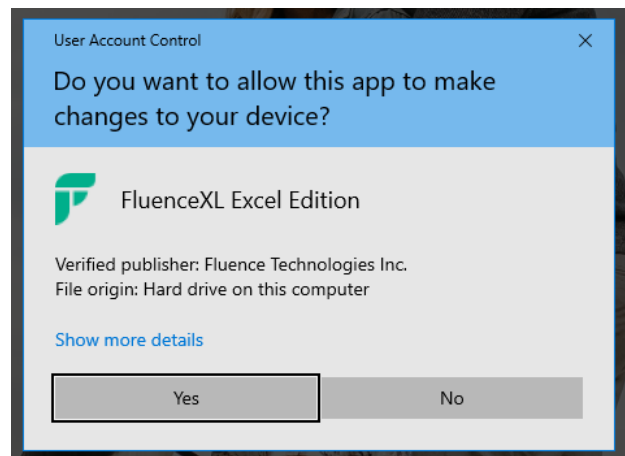
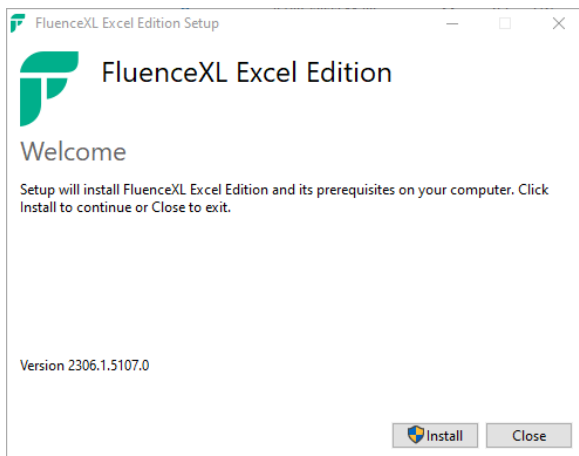
Once you have downloaded the evaluation, you will need to install FluenceXL on your device to start using it. FluenceXL requires Microsoft windows and Microsoft Excel. Please ensure that Microsoft Excel is not open before you start the installation process.

Firstly, locate the FluenceXLExcelEditionSignedV### app file in your downloads and double click on it.

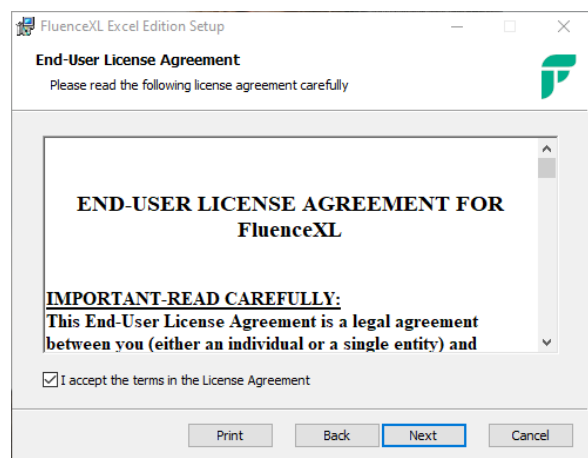
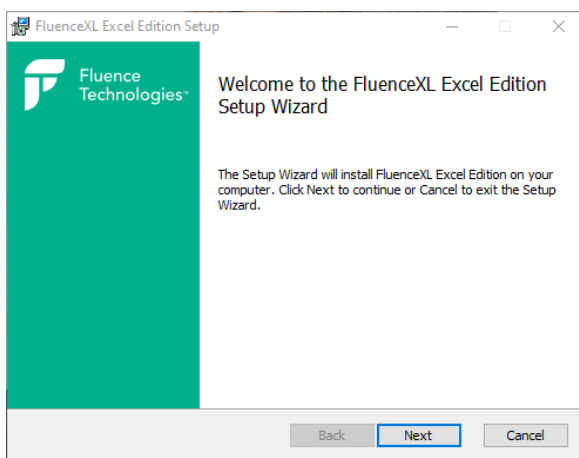


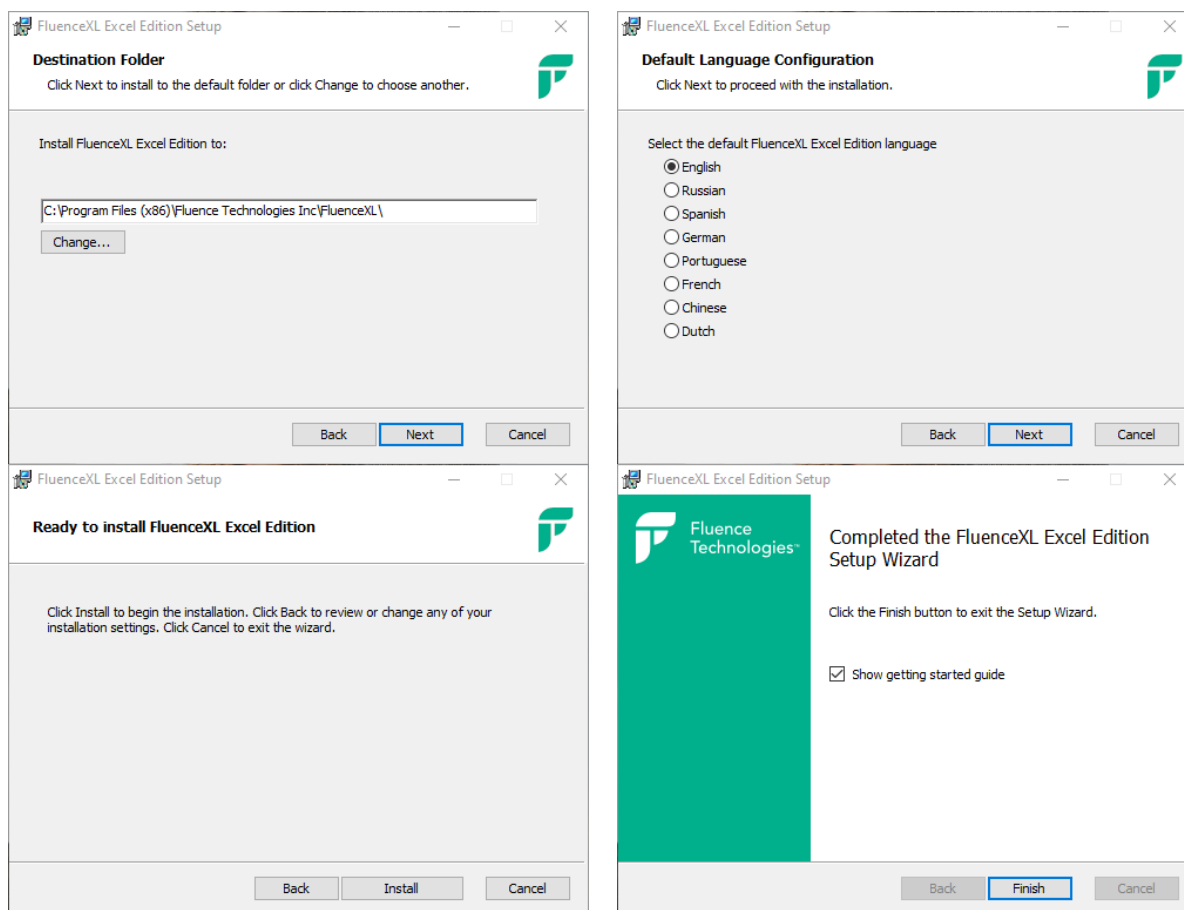
This will open the zip and show the application inside it. To install FluenceXL, double click on the application to launch the installer.

The FluenceXL Setup will open. Click install to get started, and you will be prompted by windows to allow the installer to run. Click “Yes”.

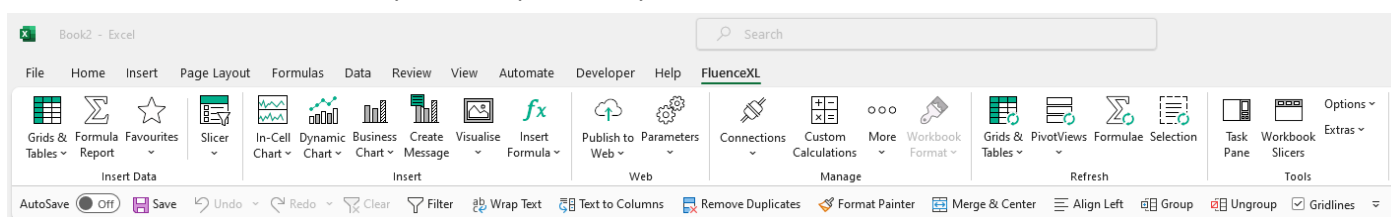


Click next through on each of the subsequent screens to agree to the license agreement, choose your language, and specify the installation folder, and then launch the installation.





The software is now installed. If you now open Excel you will see FluenceXL as a new tab on the ribbon.



If the ribbon is not visible, please contact us at support@xlcubed.com.

Background

FluenceXL helps business users in all aspects of reporting and analytics. It connects Excel to corporate data which avoids the issues associated with Excel as a data store, while extending the Excel flexibility business users love. FluenceXL also addresses many of the common pain-points users find with Excel pivot tables, providing a richer and a more productive reporting experience.

A key aspect of FluenceXL is that the data itself is not held in Excel but in a central database. FluenceXL connects to a wide range of sources including Microsoft Analysis Services (Tabular, Multidimensional, and Azure), Power BI, SAP HANA, IBM TM1, Oracle Essbase, Incorta and Kyvos. FluenceXL can also connect directly to relational databases.

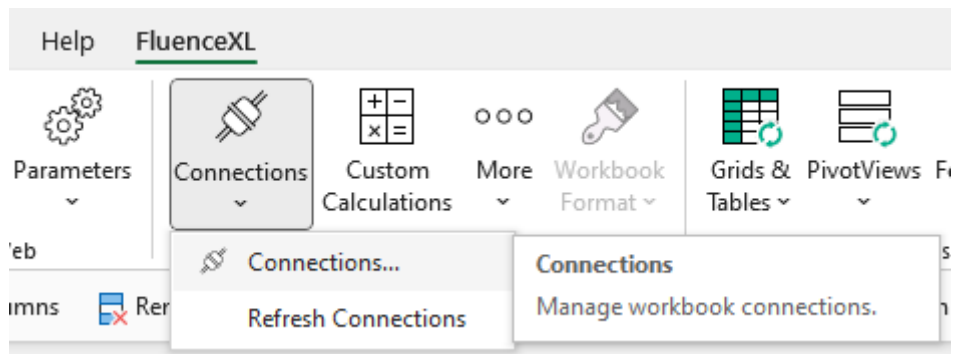
Reports and dashboards developed in Excel can easily be shared with portal and mobile users through FluenceXL Web. Web published reports remain data-connected, and are fully interactive, secured, and governed.

To evaluate FluenceXL Web please contact us at support@xlcubed.com.

Connecting to your data

The evaluation version is fully functional and includes a 30-day evaluation license which allows you to connect to your own data.

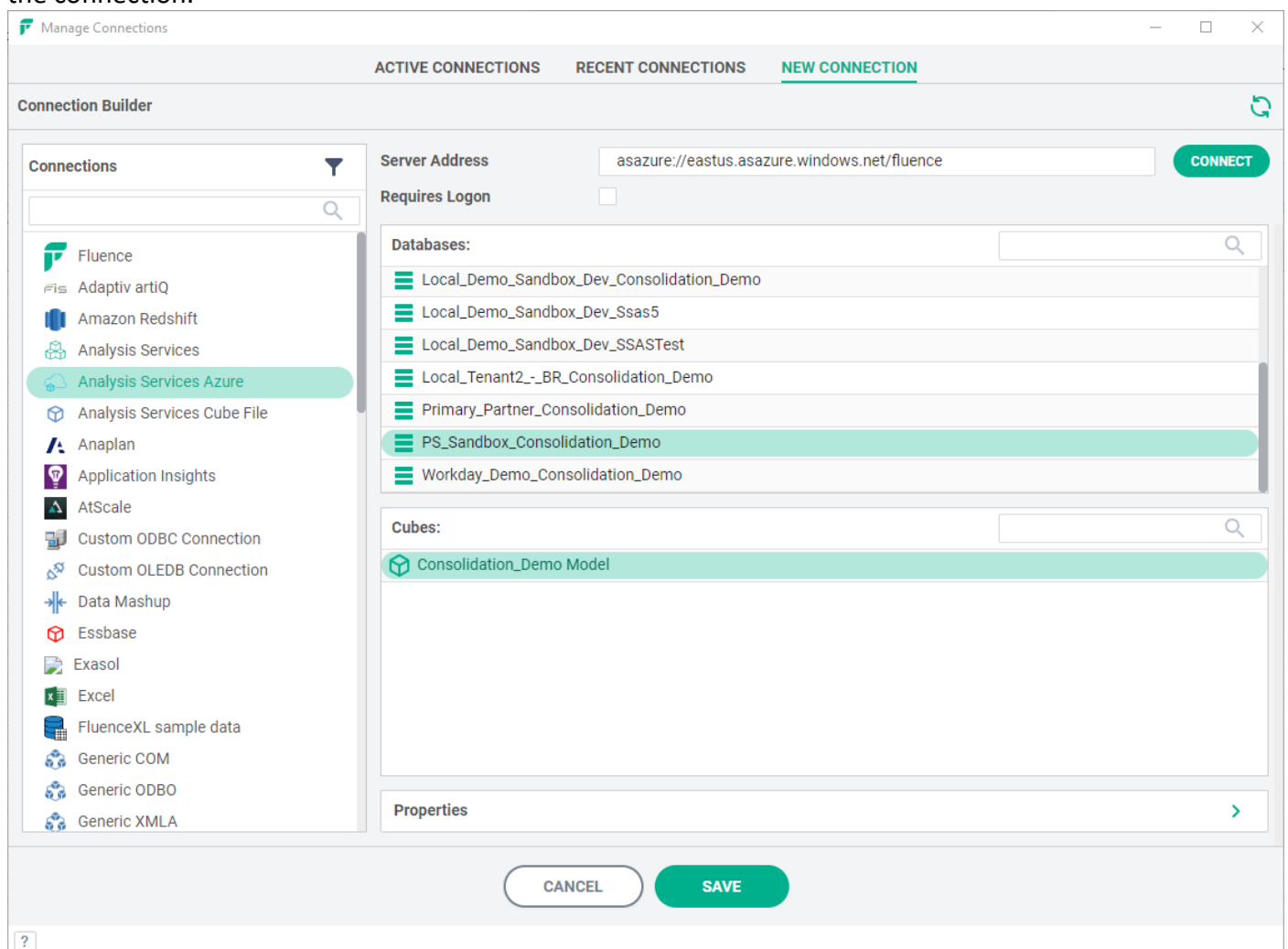
To connect to your own data, go to the connections dialog in the FluenceXL ribbon.



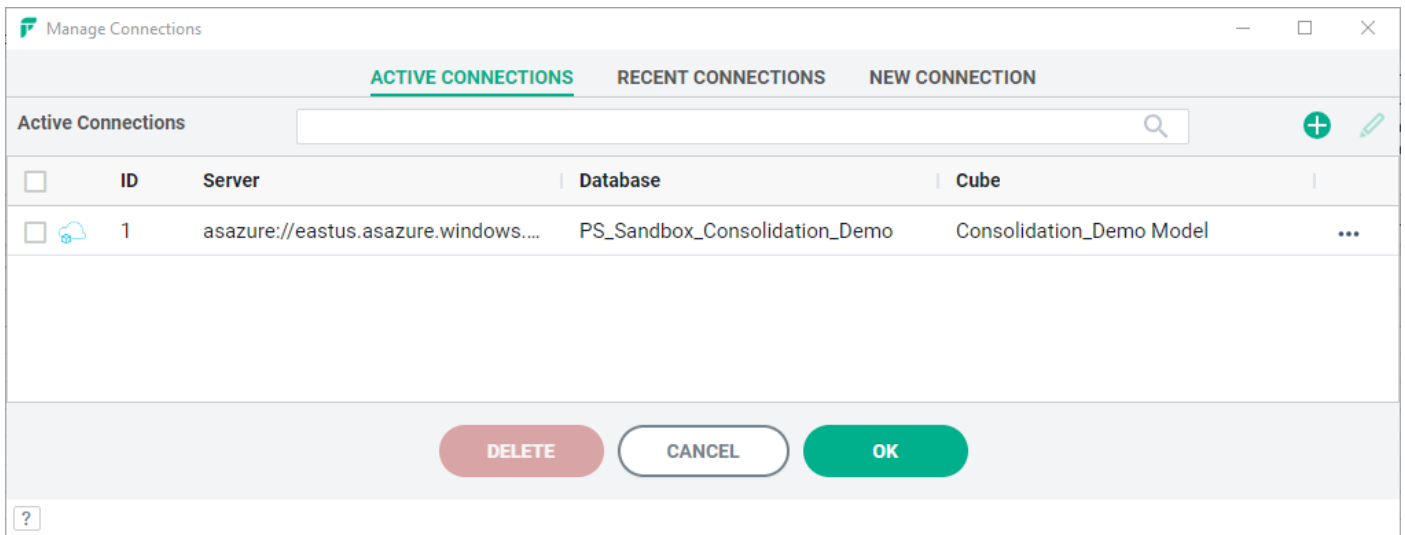
In the new menu, navigate to the “New connection” tab.

There are some differences depending on the connection type but the basic steps are detailed below.

Choose your connection type from the menu on the left, type your server address and press Connect. You can then choose from the available databases the cube you want to connect to, and press “SAVE” to add the connection.

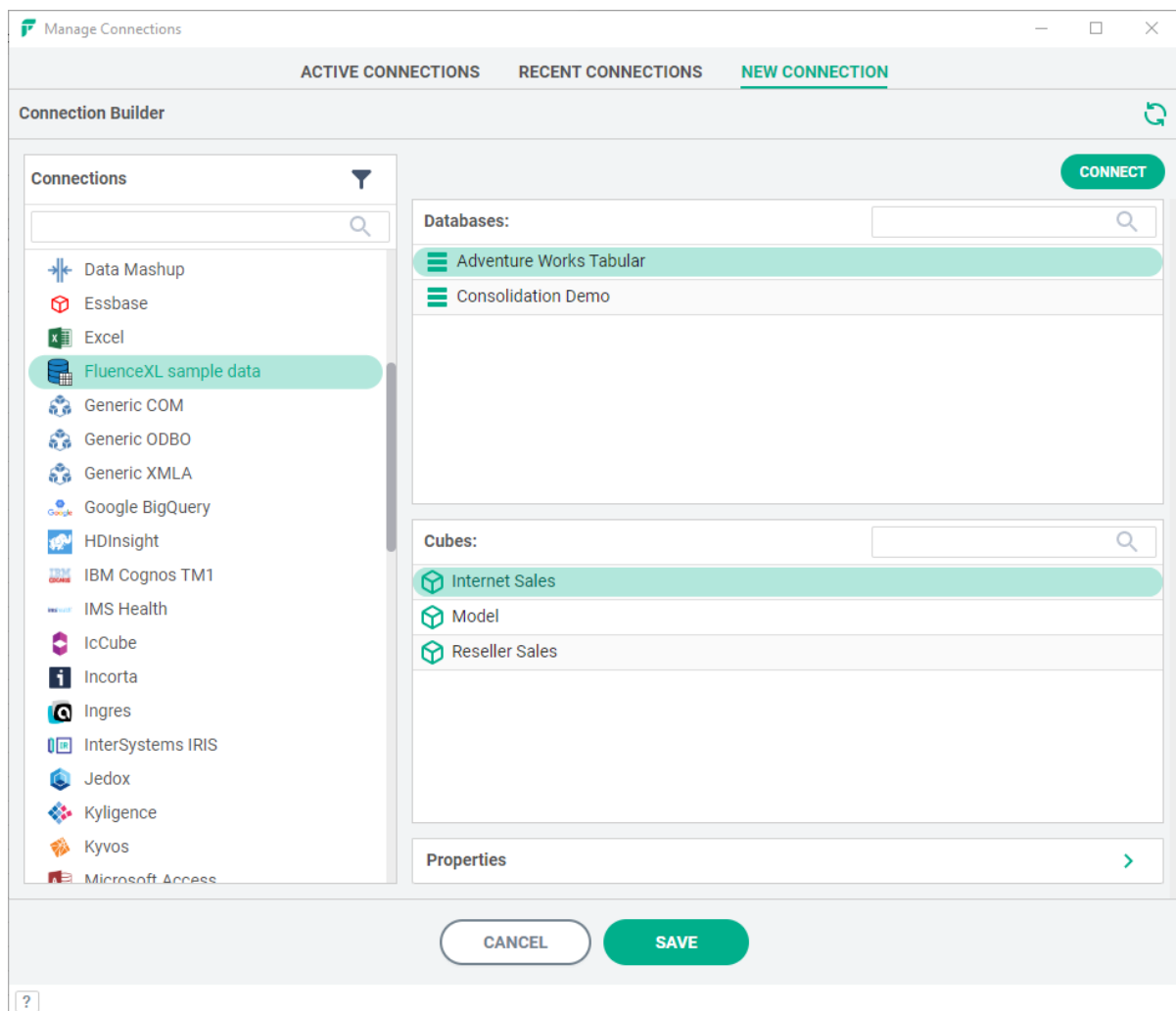


Once the connection is added, you will see it in the “Active connections” tab. If you are using multiple connections, you will see them all in this tab.

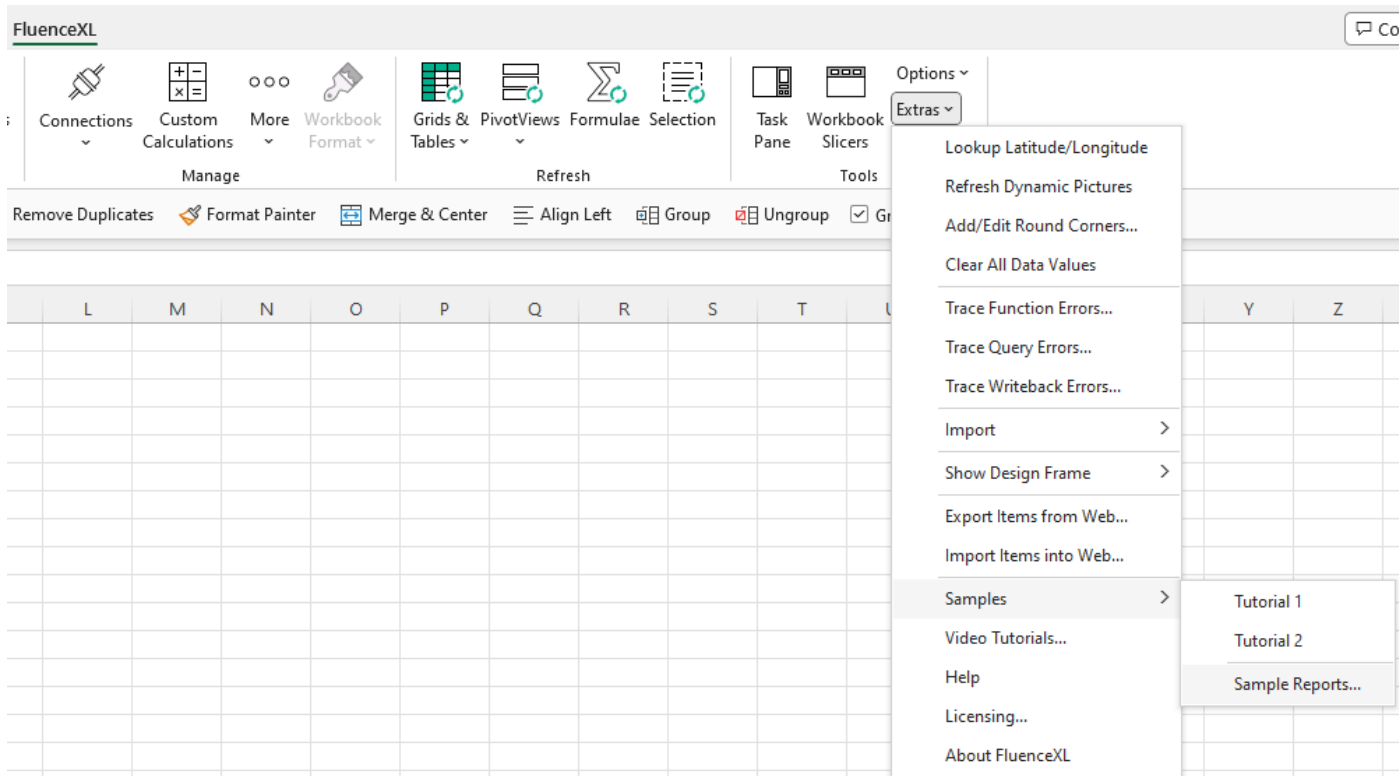


Sample Data connection

We also provide a sample dataset which you can use to familiarise yourself with the product. To connect to it, simply choose the “FluenceXL sample data” connection from the list of available connections.



Some example reports which connect to the sample dataset are available to download through the FluenceXL ribbon by choosing the Extras – “Sample Reports...” option. This will open a web page with the report pack.

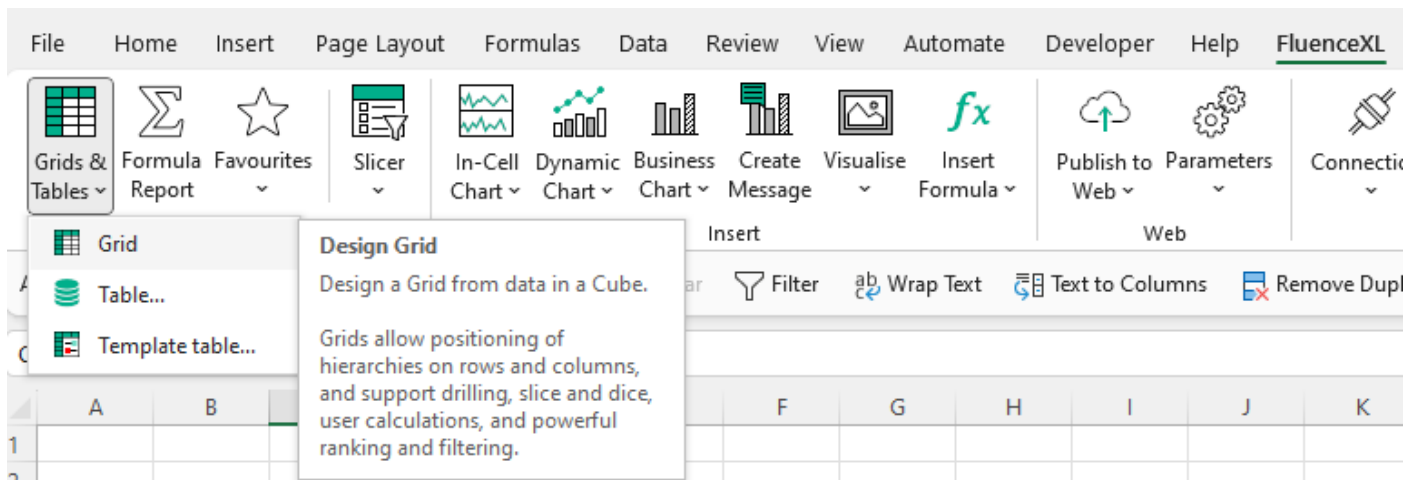


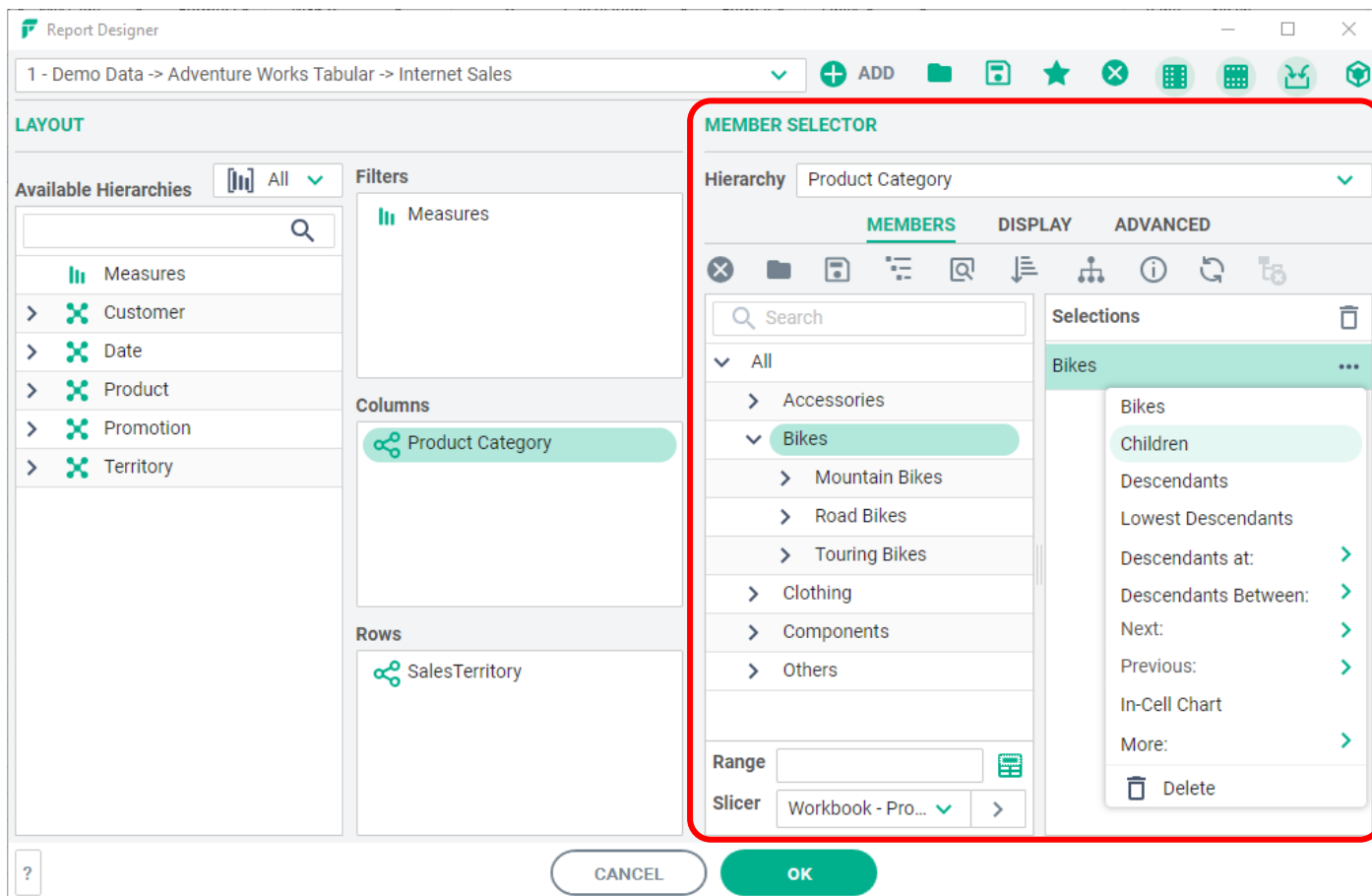
Building a Report

If you are very familiar with using Pivot Tables when connecting to Analysis Services cubes we suggest reading [this section](#) first to highlight some key differences and enhancements in FluenceXL. Otherwise, read on...

FluenceXL has two main reporting modes, Grids and Formulae. Grids are similar to a pivot table but optimised for data-connected BI. Grids are what most FluenceXL users primarily use. Formulae are well suited to highly formatted reports with a specific layout, which are relatively small in terms of the number of cells retrieved. The product also provides report slicers and a number of data visualisations and charts which work well in business-focused dashboards and scorecards.

To add a new Grid, on the FluenceXL ribbon, choose 'Grids and Tables' and then 'Grid', to bring up the report designer screen below.





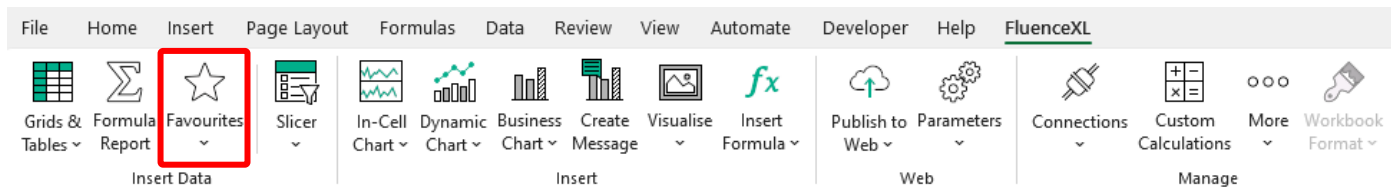
REPORT DESIGNER

The Report Designer is separated into 5 main areas:

- 1) **Available Hierarchies**
Lists the available dimensions and hierarchies in the current model. Expand the dimension to view the available hierarchies. Drag the hierarchies you want to use from here into Filters, Columns or Rows as needed.
- 2) **Filters**
A set of hierarchies for user selections, which will be displayed at the top of the grid. User selections made in the Filter area determine the numbers displayed in the report body.
- 3) **Rows & (4) Columns**
Containers for hierarchies to be positioned on rows and columns respectively.
- 5) **Member Selector**
Surrounded in red in the screenshot above, the member selector displays the content of the selected hierarchy. The hierarchy tree can be expanded and members selected by dragging to the right. For a selected member, the drop down menu enables selection of related sets of data such as children, lowest descendants or descendants at a level.
Range: Selections can also be based on the content of an Excel cell, or range of cells.
Slicer: Selections can also be based on an FluenceXL slicer selection.

Press 'OK' to insert the report.

Note that if you regularly set up similar grids, you can add the report definition as a Favourite (★ from the toolbar above Available hierarchies), which can then be easily accessed from the main FluenceXL ribbon.



Working with Grids

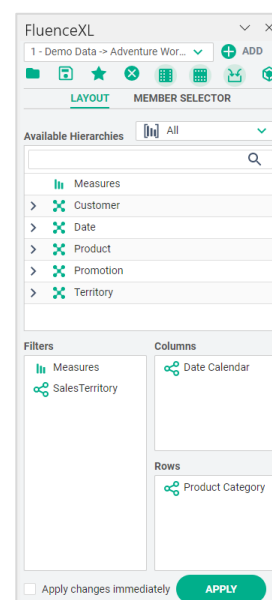
Multiple grids can exist in the workbook, and in individual worksheets. Each grid is an FluenceXL object, and is manipulated through the grid designer, the task pane, the Grid Ribbon or the FluenceXL right click menu.

Grid Components

- Filter Area (C3:D4)
- Dimension Labels (C3:C4, D7, C8)
- Selected Dimension Members (C9:C23, D8:H8)
- Data Area (D9:J23)

	A	B	C	D	E	F	G	H	I	J	K
1											
2											
3			Measures	Internet Sales							
4			SalesTerritory	All							
5			QuickStart Example Grid								
6											
7				Date Calendar							
8			Product Category	-2021	+Q1 21	-Q2 21	+Apr 21	+May 21	+Jun 21	+Q3 21	
9			-All	\$ 9,770,900	\$ 4,283,630	\$ 5,436,429	\$ 1,608,751	\$ 1,878,318	\$ 1,949,361	\$ 50,841	
10			+ Accessories	\$ 407,050	\$ 173,551	\$ 199,755	\$ 62,674	\$ 71,880	\$ 65,201	\$ 33,745	
11			+ Bike Racks	\$ 22,920	\$ 8,880	\$ 11,640	\$ 2,520	\$ 5,400	\$ 3,720	\$ 2,400	
12			+ Bike Stands	\$ 20,670	\$ 8,268	\$ 10,653	\$ 4,611	\$ 3,975	\$ 2,067	\$ 1,749	
13			+ Bottles and Cages	\$ 33,518	\$ 15,034	\$ 16,717	\$ 5,356	\$ 5,526	\$ 5,834	\$ 1,767	
14			+ Cleaners	\$ 4,174	\$ 1,781	\$ 2,043	\$ 549	\$ 731	\$ 763	\$ 350	
15			+ Fenders	\$ 27,211	\$ 11,583	\$ 13,276	\$ 3,868	\$ 4,924	\$ 4,484	\$ 2,352	
16			+ Helmets	\$ 132,752	\$ 55,634	\$ 67,706	\$ 21,134	\$ 23,828	\$ 22,744	\$ 9,412	
17			+ Hydration Packs	\$ 23,536	\$ 10,888	\$ 11,163	\$ 2,585	\$ 4,399	\$ 4,179	\$ 1,485	
18			+ Tires and Tubes	\$ 142,270	\$ 61,482	\$ 66,558	\$ 22,051	\$ 23,097	\$ 21,410	\$ 14,230	
19			- Bikes	\$ 9,162,325	\$ 4,024,025	\$ 5,138,299	\$ 1,514,049	\$ 1,775,297	\$ 1,848,954		
20			+ Mountain Bikes	\$ 3,814,691	\$ 1,658,240	\$ 2,156,451	\$ 584,943	\$ 774,443	\$ 797,065		
21			+ Road Bikes	\$ 2,920,268	\$ 1,280,739	\$ 1,639,528	\$ 503,620	\$ 556,675	\$ 579,233		
22			+ Touring Bikes	\$ 2,427,366	\$ 1,085,046	\$ 1,342,320	\$ 425,486	\$ 444,179	\$ 472,656		
23			+ Clothing	\$ 201,525	\$ 86,054	\$ 98,375	\$ 32,028	\$ 31,140	\$ 35,206	\$ 17,096	
24											
25											

FluenceXL Grid



FluenceXL Task Pane

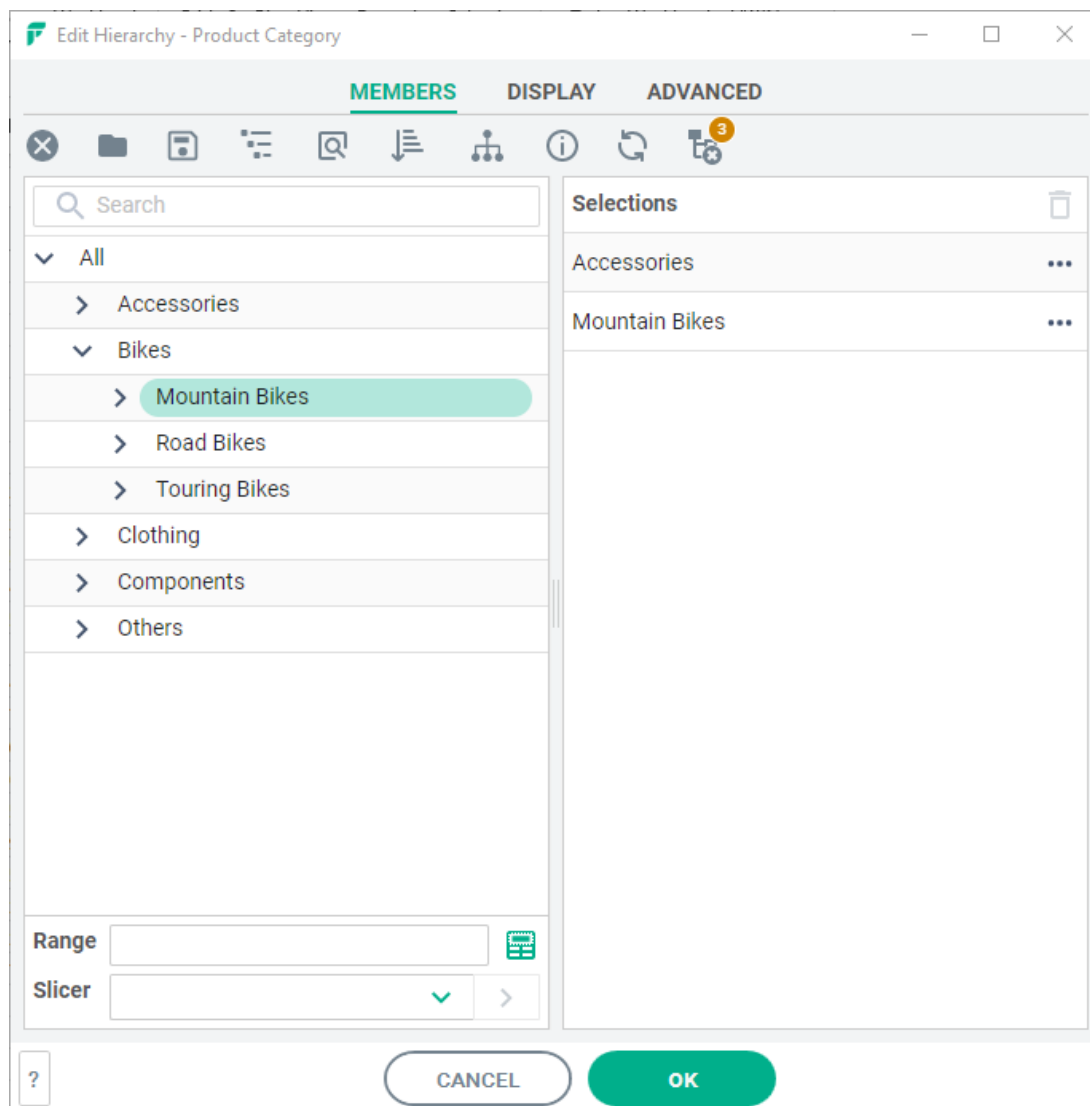
Basic Navigation

You can interact with the grid in a number of ways:

- **Design Grid (Report Designer)**
 - To bring up the report designer for the current grid you can choose Design Grid from the Grid Ribbon, or the right click menu, or can alternately double click one of the numeric cells in the grid.
- **Task Pane**
 - You can turn on the Grid Task pane from the FluenceXL ribbon and can then position and make selections in hierarchies here.
- **Changing Selections directly on the grid** – For filters, double click on the Filter Selection or dimension label for the required hierarchy (C3:D4). For rows or columns, double click on the dimension label (C8/D7). This brings up the member selector for the selected hierarchy.
- **Drilling** applies to Members located on either Rows or Columns.
 - Drill up/down by double clicking on a member.
 - “Drill all” currently selected members by right clicking on a member and selecting the ‘Drill All’ option from the FluenceXL menu.
- **“Keep Only” / Quick Selections**
 - To quickly select only certain member/s which are currently shown in a grid
 - Click on the cell or cells containing the members, and right click and select FluenceXL:
 - Keep Only (all selected members)
 - Keep all other Members (all unselected members)



Member Selector

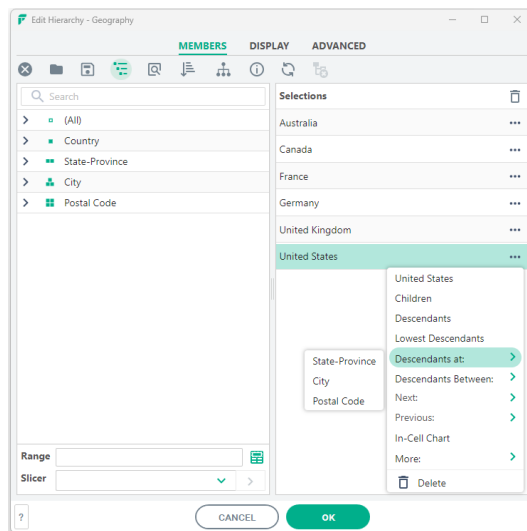
The Member Selector is used in many of the FluenceXL forms, including the Report Designer. By double clicking the hierarchy label in a Grid, the user can bring up the Edit Hierarchy window on its own for that particular hierarchy.



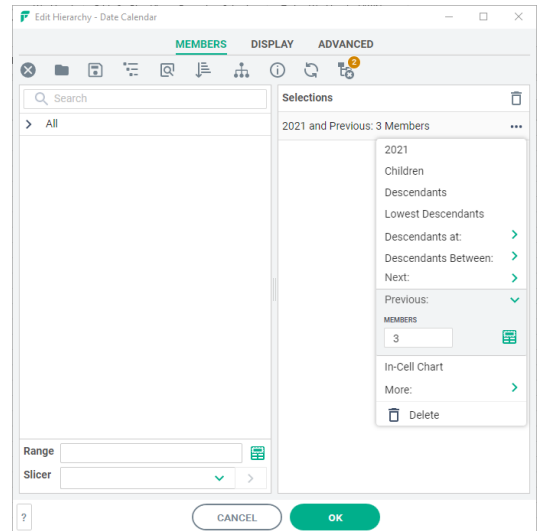
To select a member, drag or double click it to the right hand pane of the window. Shift and Ctrl keys can be used for multi-select.

The other main features of the Member Selector include:

- Member searching 
- Member lists can be saved and loaded  for repeated use or distribution.
- Dynamic selection options to select related sets of data.

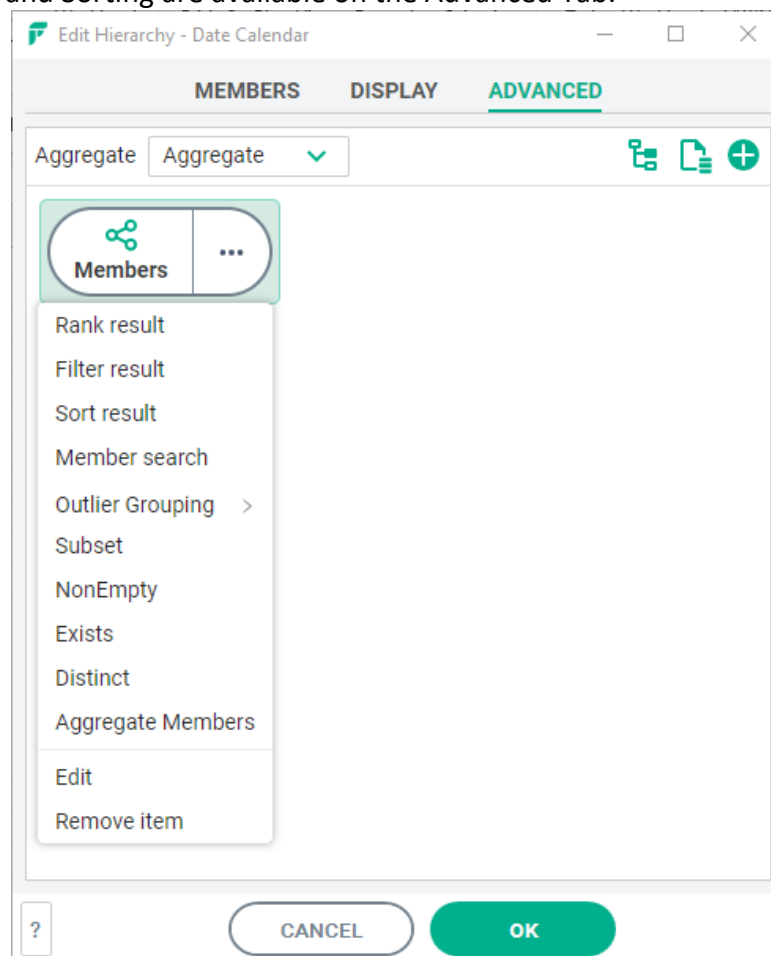


Member Selection Drop Down Menu



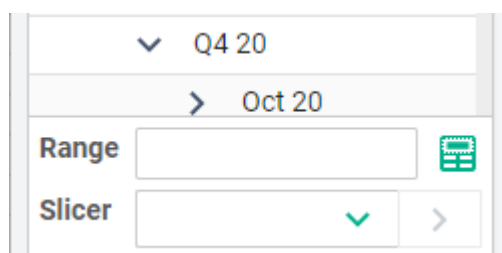
Next and Previous: useful in date hierarchies

- 'Children of', or 'Descendants at' a chosen level, or 'Previous 'x'' which can be useful to create 'rolling period' date selections.
- Members can also be selected based on an Excel Range
- Or an FluenceXL Slicer
- Filtering, Ranking and Sorting are available on the Advanced Tab.



- Member Properties are available on the Display Tab

Range Selection (base selection on an Excel range)

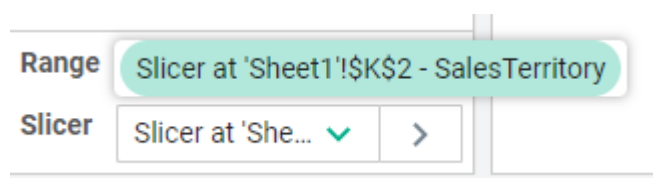


Using this method the user can specify a cell or a range of cells that will drive the Member Selection for a grid. This can be populated by any means, such as manual entry, copy paste, formulas, drop down lists, FluenceXL Slicers etc. This is supported for hierarchies in the Filter, Column or Row areas of the Grid.

This approach can be used:

- In the report header area to allow the user to quickly type well known codes or names into a cell and have the grid refresh based on this input.
- On rows or columns, to cause the grid to refresh based on a range of cells held elsewhere in the workbook, and potentially populated by copy-paste, or by another application
- **Note:** Once the Excel range is chosen, related sets of data can still be specified (i.e. Children of or Descendants at a specified level).

Slicer (User makes selections using an FluenceXL Slicer)

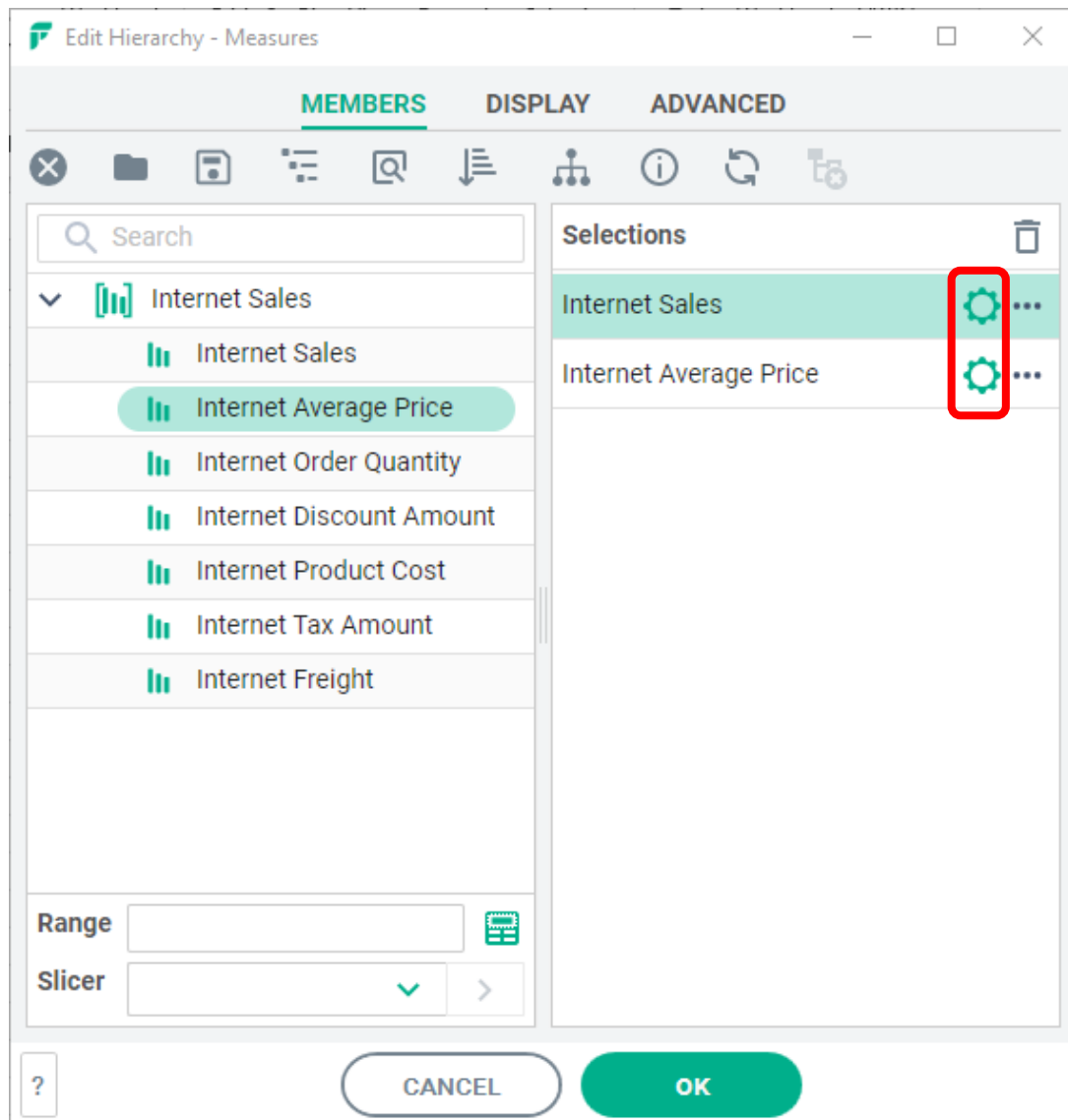


([See page 16 for slicer creation](#)) Here the user can choose an FluenceXL Slicer which will drive the selection. The drop down menu will list any slicers which exist in the workbook for the current hierarchy.

Once selected, related sets of data can still be specified if required (i.e. Children of, or Descendants at a specified level). This is typically used to drive multiple grids from one FluenceXL slicer.

Formatting Grids

Formatting a measure: Open the Member Selector for 'Measures' by double clicking the Measures hierarchy label, or from within the Report Designer. Select the measure you wish to format, and then use the formatting button, shown below to set the Excel numeric format required for each measure.



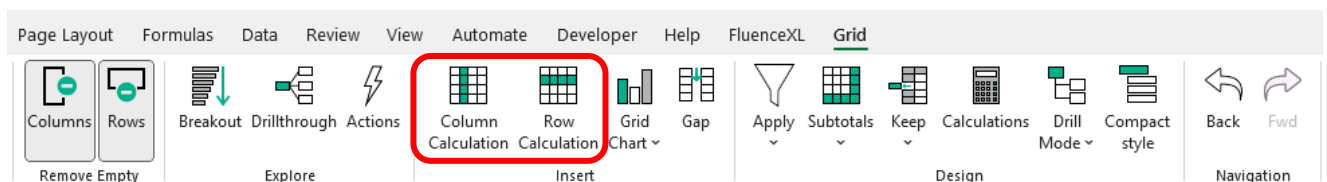
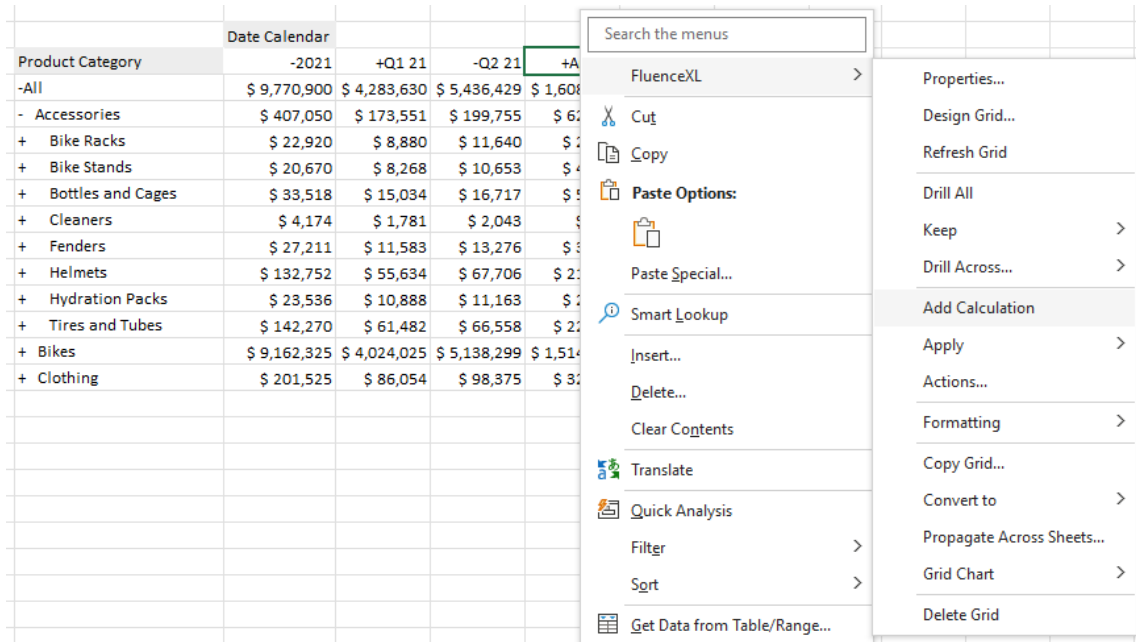
For more detail see our [Wiki](#). Alternatively, see the section on **Grids > Formatting Grids** in the **FluenceXL User Guide**. You can download the latest version from: [User Guide](#)

User Calculations

There are two main types of dynamic user calculations in FluenceXL - Grid calculations and Workbook Calculations.

Grid Calculations

Users can easily add calculations into a grid using an Excel formula. These calculations exist only in the current grid. This is done by right clicking on a member name in columns or rows, and selecting FluenceXL – Add Calculation, or from the Grid Ribbon as highlighted below. This adds an additional column to the right (or beneath if on rows).

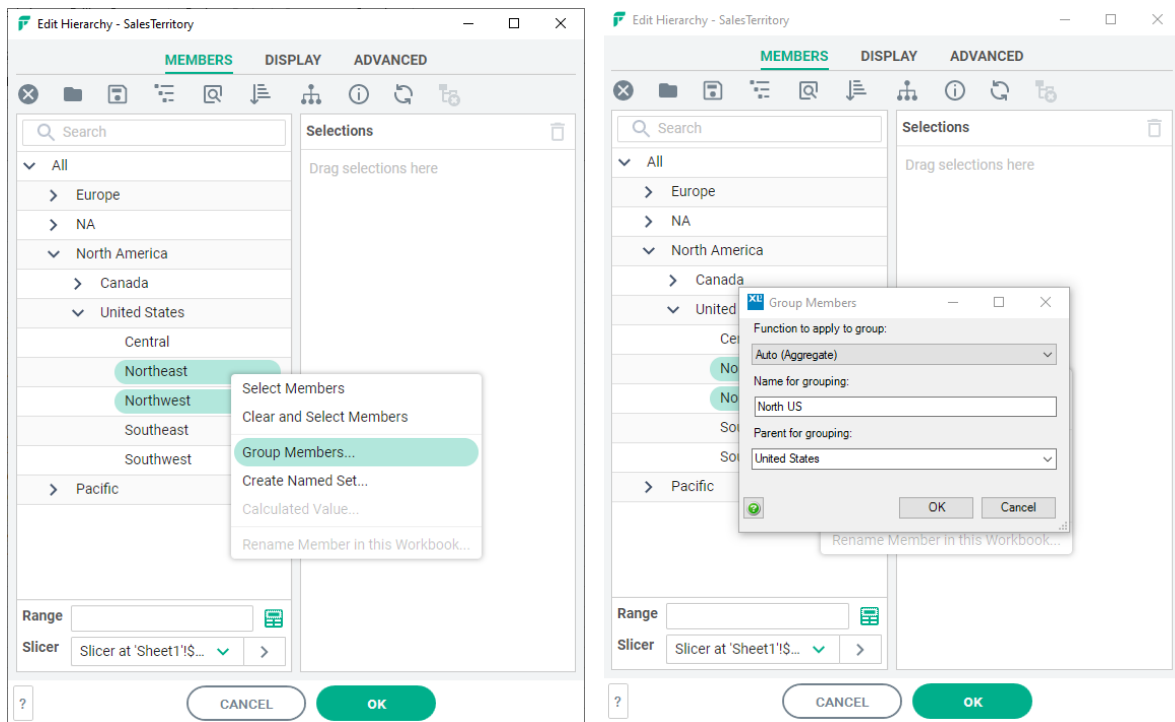


- The title can then be typed in the column header area (default name is [Calc])
- The formula itself is typed into the first data row, using Excel
- The formula will then be propagated down through the other rows
- The row or column is now formatted in the same manner as the rest of the grid.
- The Calculation can be managed by using the options on the FluenceXL Menu
- To change the calculation just overwrite the formula
- To delete it, right click on the row/column title and choose FluenceXL – Calculation – Delete Calculation

The calculation can be contained purely within the grid or bound to a cell(s) outside the grid. It can also incorporate Excel functions such as VLOOKUP etc, or FluenceXL formulae.

Workbook Calculations (Custom Groupings / MDX)

These calculations are available throughout the current workbook. Users can quickly add custom groupings or Sets into their reporting, from the right click menu in the member selector as shown below:



Then name the grouping as required, and choose the parent element which the group is to appear under. The new element will appear as a custom calculation in the member selector. Creating a set of members is handled in a similar way.

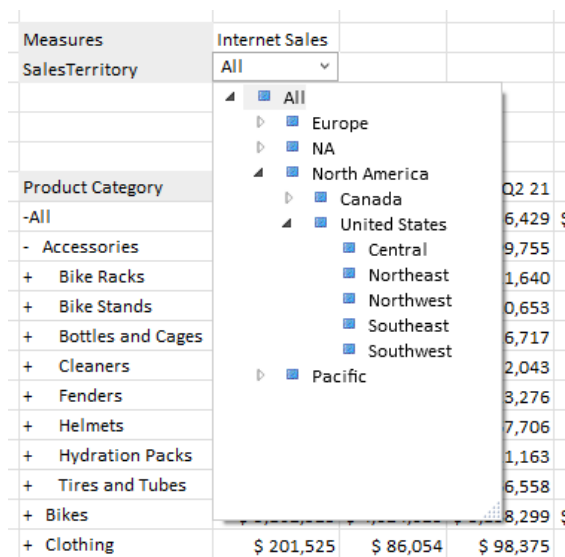
To amend or delete a grouping or set created in this way, or to create a more complex MDX calculation select the custom calculation tab on the FluenceXL ribbon.

For more detail, see our [Wiki](#). Alternatively, see the section on **Grids > Grid Calculations** in the **FluenceXL User Guide**. You can download the latest version from: [User Guide](#)

Slicers

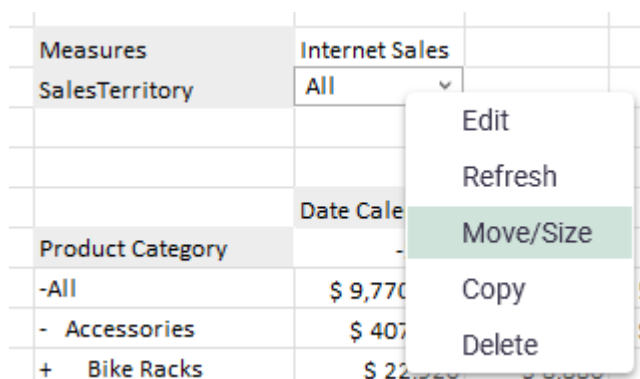
Slicers in FluenceXL offer more display options and flexibility in selection than those available in native Excel. They have 5 different display types and can contain members from different levels of the hierarchy, support cascading and filtering between slicers, and can incorporate ranked and filtered results. This section covers the basics of usage, for more detail see our [Wiki](#). Alternatively, see the section on **Slicers** in the **FluenceXL User Guide**. You can download the latest version from: [User Guide](#)

To add a slicer to a grid, right-click on the relevant hierarchy member in the filter area and choose FluenceXL → 'Add Slicer'. The default will be an in-cell tree view with the default or last active member selected.



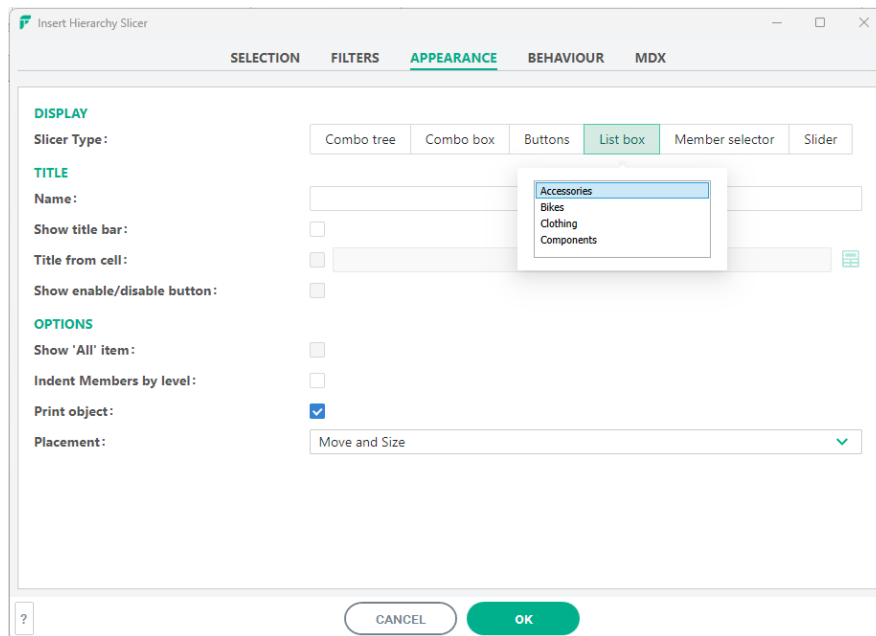
Measures	Internet Sales		
SalesTerritory	All		
Product Category			
-All			Q2 21
- Accessories			6,429 \$
+ Bike Racks			9,755
+ Bike Stands			1,640
+ Bottles and Cages			0,653
+ Cleaners			6,717
+ Fenders			2,043
+ Helmets			3,276
+ Hydration Packs			7,706
+ Tires and Tubes			1,163
+ Bikes			6,558
+ Clothing			8,299 \$
	\$ 201,525	\$ 86,054	\$ 98,375

Note that once inserted, grid slicers can be positioned where required, they are not restricted to the grid area. This is done by right-clicking, and selecting 'Move/Size' then dragging the control to the desired position



Measures	Internet Sales		
SalesTerritory	All		
Product Category			
-All			\$ 9,770
- Accessories			\$ 407
+ Bike Racks			\$ 22,220

Once inserted, right click on the slicer and choose 'Edit' for configuration and design options.



Dimension Slicer – Edit

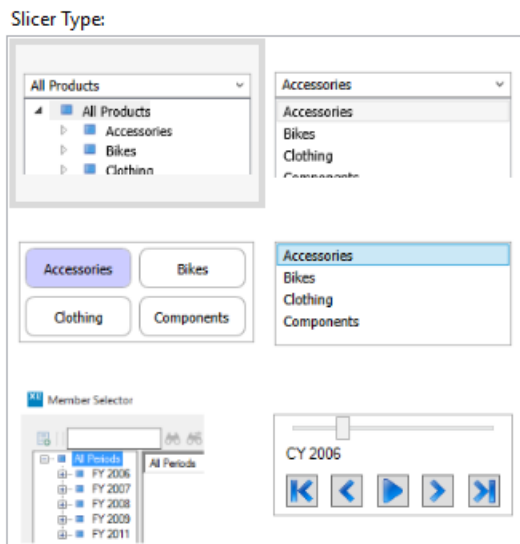
Choose the required slicer display type in the “Appearance” tab, and then using the member selector in the “Selection” tab, choose the set of members to enable selection from.

For a tree view, no set of members need be chosen, as the user can navigate the hierarchy. For the other display types it is important to choose the set to be used. These can be either static lists of members, or dynamic selections such as children or/descendants at level, Level ‘x’ or even ranked lists etc. Note that the slicer content can also be driven from an Excel cell, by using the Range selector (e.g. Children of E11’), or from the result of another slicer.

Slicers can also update a specified range which could be used as the argument for XL3Lookup formulae or for a report title. This is enabled by checking the ‘Update range with selection’ option

which is in the “Behaviour” tab and specifying the output cell. It can be either the Unique Name or the caption.

A slicer can be used to drive one or several several grids. The easiest way to do this is to simply select the slicer within the member selector for the relevant hierarchy for the secondary grids.



The screenshot displays the Microsoft Report Designer application. On the left, a report preview shows a table with columns for Product Category, Date Calendar, and various sales metrics. The table is filtered by 'Internet Sales' and 'All' for the SalesTerritory. The data is organized by Date Calendar, with rows for -2021, +Q1 21, -Q2 21, and +Apr 21. The metrics include sales amounts and counts for various product categories like Accessories, Bike Racks, and Helmets.

On the right, the Member Selector pane is open, showing the hierarchy of the report. The 'SalesTerritory' member is selected. The pane also shows the 'Columns' and 'Rows' sections, with 'Date Calendar' and 'Product Category' respectively. The 'Range' and 'Slicer' sections are also visible, showing the current selection range and slicer options.

The screenshot shows the 'MEMBER SELECTOR' dialog box in the Power BI Report Designer. The dialog is used to select a hierarchy for a visual. The 'Hierarchy' dropdown is set to 'SalesTerritory'. The 'MEMBERS' tab is selected, showing a search bar and a list of members. The 'Columns' section shows 'Date Calendar' and 'Product Category'. The 'Rows' section shows 'Product Category'. The 'Range' and 'Slicer' options are visible at the bottom.

'Slicer' is an additional selector at the bottom of the member selector which will make available any slicers which exist in the workbook for the current hierarchy, as shown. Pick the required slicer and use the "." to select it. Once the slicer is selected, any related set of data is then available, for example 'children of', or 'descendants at level x'.

Workbook slicers

Slicers can also be created at the workbook level – these can then be displayed for all sheets in the workbook.

The slicers are displayed in a pane which stays in place when the sheet is changed. In a multi-sheet workbook you need to only define one set of slicers. These can then be configured to be shown or hidden for individual sheets as needed.

XLCubed Workbook Slicers

Date Calendar

2019
2020
2021

Product Category

All

SalesTerritory

All

D10

407050.25

	A	B	C	D	E	F	G	H	I	J
3			Measures	Internet Sales						
4			SalesTerritory	All						
5										
6										
7				Date Calendar						
8			Product Category	-2021	+Q1 21	-Q2 21	+Apr 21	+May 21	+Jun 21	+Q3 21
9			-All	\$ 9,770,900	\$ 4,283,630	\$ 5,436,429	\$ 1,608,751	\$ 1,878,318	\$ 1,949,361	\$ 50,841
10			- Accessories	\$ 407,050	\$ 173,551	\$ 199,755	\$ 62,674	\$ 71,880	\$ 65,201	\$ 33,745
11			+ Bike Racks	\$ 22,920	\$ 8,880	\$ 11,640	\$ 2,520	\$ 5,400	\$ 3,720	\$ 2,400
12			+ Bike Stands	\$ 20,670	\$ 8,268	\$ 10,653	\$ 4,611	\$ 3,975	\$ 2,067	\$ 1,749
13			+ Bottles and Cages	\$ 33,518	\$ 15,034	\$ 16,717	\$ 5,356	\$ 5,526	\$ 5,834	\$ 1,767
14			+ Cleaners	\$ 4,174	\$ 1,781	\$ 2,043	\$ 549	\$ 731	\$ 763	\$ 350

Formula Reporting

In Formula mode, the data is returned via a collection of FluenceXL Formulae. Each cell contains a formula rather than just the data itself. Each cell is self-sufficient and using this approach it is possible to put any value in any cell, and therefore to have fully disjoint reports. Formula reports will often be preferred where the required formatting is complex, or where existing 'static' financial reports are being replaced.

Most formula reports are built primarily using two FluenceXL formulae.

XL3Lookup - the key formula which retrieves the cube value from a specified slice, and will normally reference several XL3Member formulae, or text cells in Excel which specify valid member names.

XL3Member - returns the caption for a specified member, and these are then referenced by xl3lookups

Income Statement		Actual	Budget	Variance
This Period				
Net Sales		16,100	17,786	(1,686)
Total Cost of Sales		3,714	5,937	(552)
Gross Margin		10,714	11,849	(1,134)
% of Sales		67%	67%	
Cost of Operations				
Labor Expenses		4,976	4,869	107
Travel Expenses		187	172	15
Marketing		40	42	(2)
Telephone and Utilities		254	240	14
Depreciation		250	230	20
Commissions		531	526	5
Office Supplies		43	45	(2)
Professional Services		29	27	2
Other Expenses		28	28	0
Rent		92	86	5
Operating Expenses		6,429	6,265	164
Operating Profit		4,285	5,584	(1,299)
Other Income and Expense		16		
Taxes		1,051		
Net Income		3,250	5,584	(2,334)

Formula vs. Grid Based Reporting – Key Differences

- Formula mode supports 'any value in any cell' – reports need not be rectangular in shape.
- One block of a report can include data from several cubes, as the first formula parameter is the connection id.
- In Formula mode Excel functionality is used for all formatting etc.
- In formula mode cannot return to 'Report Designer' to change the report structure or to slice and dice by another hierarchy – this is only available at the initial design.
- Formula reports do not handle row-dynamic reporting, where the number of rows varies by a filter selection or with underlying data changes.
- For large reports in terms of the number of cells returned, a grid will always be faster than the equivalent formula report as it does not have the overhead of additional formulae to fire.

Creating Formula Reports

There are several ways to create Formula reports, but the most common is to convert a grid.

1) Convert to Formula from a Grid

- Create a grid using the Grid option to get the initial layout.
- Then right click anywhere in the data area of the grid, select the FluenceXL -> Convert To... -> Formula menu option.

	Date Calendar								
Product Category	-2021	+Q1 21	-Q2						
-All	\$ 9,770,900	\$ 4,283,630	\$ 5,436,4						
- Accessories	\$ 407,050	\$ 173,551	\$ 199,7						
+ Bike Racks	\$ 22,920	\$ 8,880	\$ 11,6						
+ Bike Stands	\$ 20,670	\$ 8,268	\$ 10,6						
+ Bottles and Cages	\$ 33,518	\$ 15,034	\$ 16,7						
+ Cleaners	\$ 4,174	\$ 1,781	\$ 2,0						
+ Fenders	\$ 27,211	\$ 11,583	\$ 13,2						
+ Helmets	\$ 132,752	\$ 55,634	\$ 67,7						
+ Hydration Packs	\$ 23,536	\$ 10,888	\$ 11,1						
+ Tires and Tubes	\$ 142,270	\$ 61,482	\$ 66,5						
+ Bikes	\$ 9,162,325	\$ 4,024,025	\$ 5,138,2						
+ Clothing	\$ 201,525	\$ 86,054	\$ 98,5						

Search the menus

FluenceXL

Cut

Copy

Paste Options:

Paste Special...

Smart Lookup

Insert...

Delete...

Clear Contents

Quick Analysis

Filter

Sort

Properties...

Design Grid...

Refresh Grid

Drill Across...

Breakout Value...

Drillthrough...

Apply

Actions...

Formatting

Copy Grid...

Convert to

Grid Chart

Delete Grid

Formula

Flex Report

Values

2) Insert Formulae manually

- This approach can be useful for small sections of a report, for the main body of a report converting a Grid will typically be faster. From the FluenceXL main menu 'Insert Formula', there are several options for inserting different types of Formulae.
- A combination of 'Insert Member' and 'Insert Value', along with copy formulae down and across means it is also fairly simple to create reports using this approach.

3) Design Formula Report

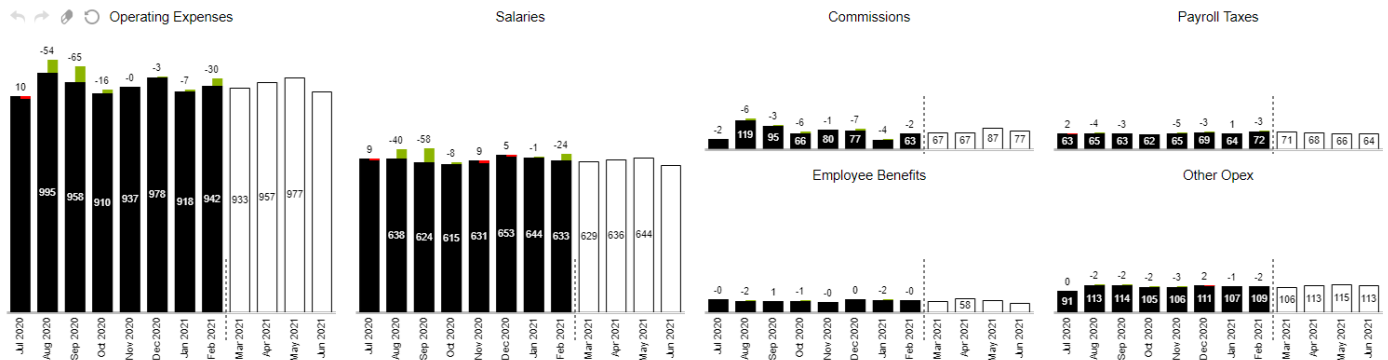
- Selecting 'Formula Report' option from the FluenceXL ribbon directly inserts a formula report. Generally converting a grid to Formula is a better option, as the initial layout can be quickly verified and/or changed while it is a grid prior to conversion.

Once inserted, formulae can easily be copied around and re-referenced to create the exact report format required. The standard Excel rules apply, so pay careful attention to the correct pinning (\$) of cell references when copying formulae.

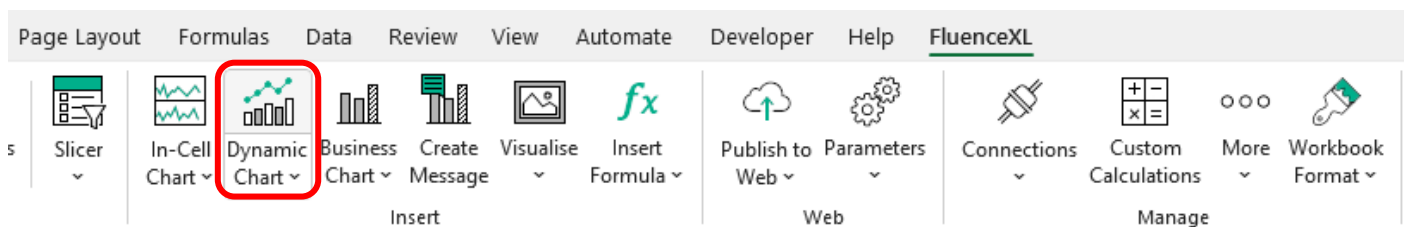
Charting & Data Visualization

Dynamic charts (Small Multiples)

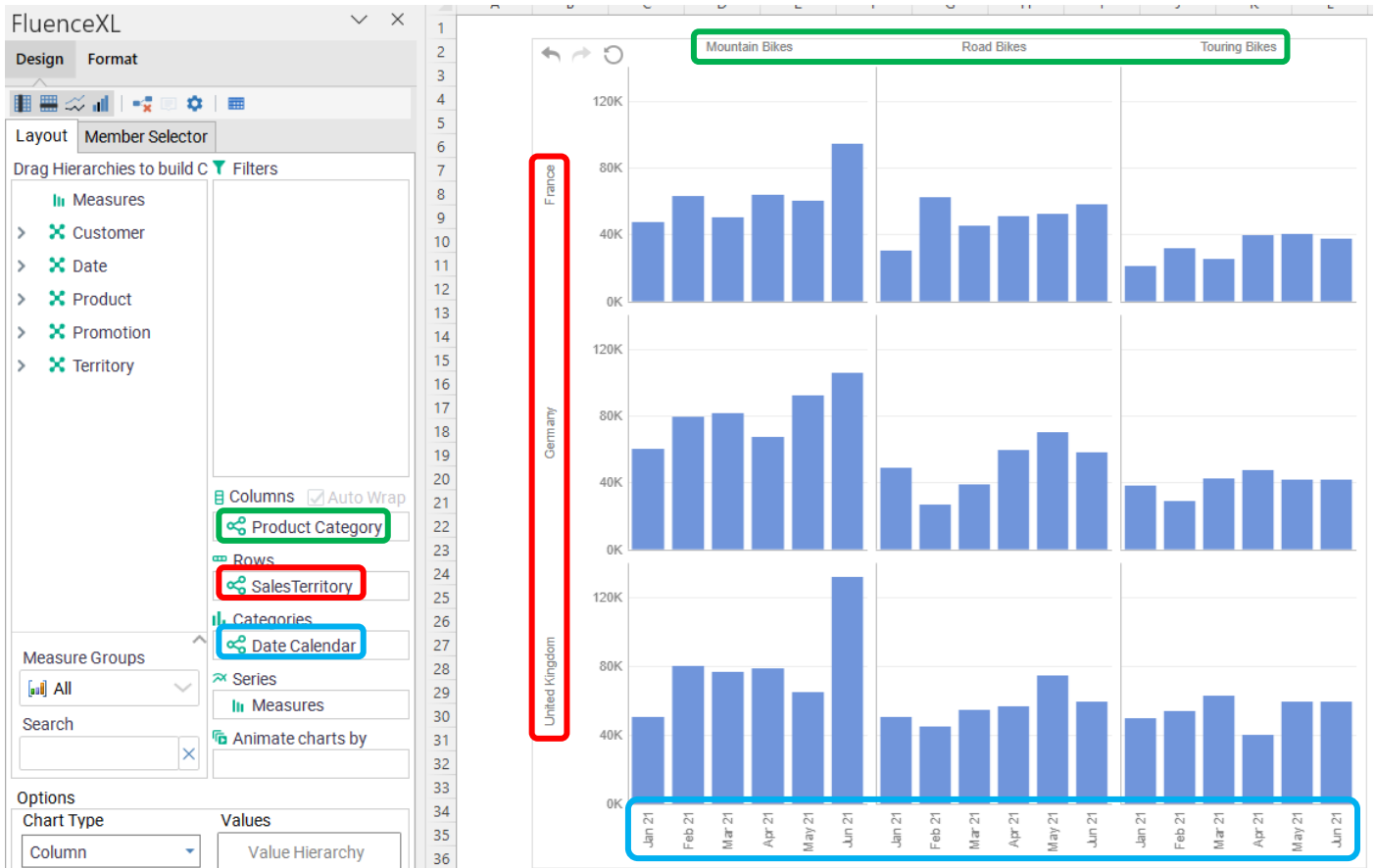
FluenceXL dynamic charts are highly interactive visual tools. They can be setup to use individual charts to display each slice of a data set. The axes are on a common scale and the only variable is the data set slice being changed. They make it easy to see shared trends, patterns or outliers across the data set.



Dynamic charts can be built from the FluenceXL ribbon.

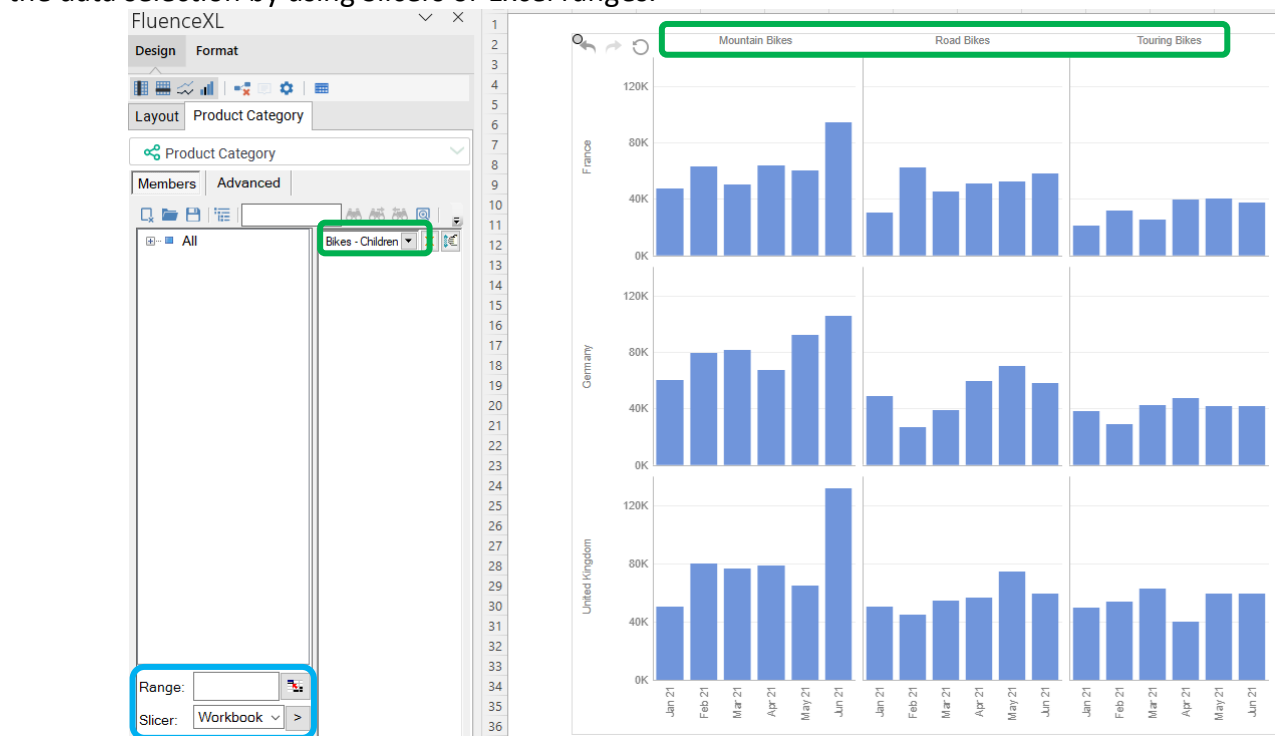


A taskpane for the chart will appear where selections can be made to define which series and members will be displayed. Categories defines the x-axis within each individual Chart. Series defines the of data series to be charted.



The data can be split into separate charts at any level by dragging and dropping the desired hierarchies into Columns and Rows.

Clicking on a hierarchy takes you to the member tab to select members/levels. Additionally, you can drive the data selection by using Slicers or Excel ranges.



Moving a hierarchy to Filters will apply a filter to the data. By moving the Measures to the Filters you can add to and or change the currently charted measure.

For more detail see our [Wiki](#) or [YouTube tutorial](#). Alternatively, see the section on **Charting & Data Visualisation > Dynamic Charts (Small Multiples)** in the **FluenceXL User Guide**. You can download the latest version from: [User Guide](#).

Standard Excel Charts

FluenceXL operates within Excel and as such any data retrieved into the workbook using FluenceXL can be charted using any standard Excel chart type. If the data being plotted is static in shape and you need very fine grain control over the chart formatting, this is likely the best approach.

In-Cell Charts

In-cell charts are small, focused charts which each fit within one Excel cell. They are designed to be used within tables of data and allow the mixing of numbers and charts together in tables. They are often a very space-efficient way to give context to, or highlight outliers in a data table.

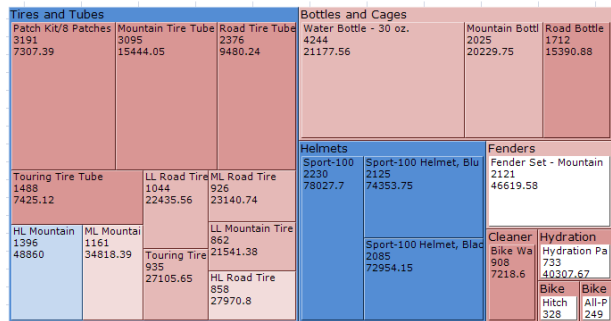


In-Cell Charts can be used in two ways within FluenceXL:
Formula-based: where an FluenceXL formula controls the chart and the data being plotted must first be returned into Excel.

Embedded in grids: where the charts are generated directly as part of the grid and support data growth.

Treemaps

A Treemap is a way to display hierarchical information using nesting rectangles or tiles. They are most often set up where the size of the rectangle depicts one metric and the colour depicts another. They can often help identify patterns which would otherwise be difficult to see.



For more detail see our [Wiki](#). Alternatively, see the section on **Charting & Visualisation > Treemaps** in the **FluenceXL User Guide**. You can download the latest version from: [User Guide](#)

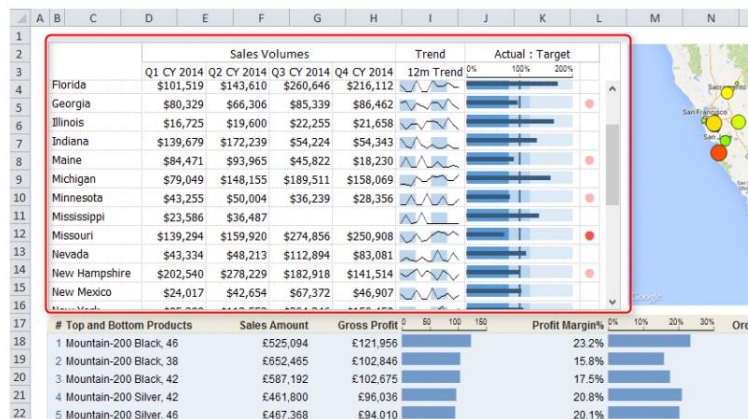
Mapping

FluenceXL provides point and shape-based geospatial mapping. The maps can be zoomed and panned as needed and can be used as a selector for a report as well as just a display.

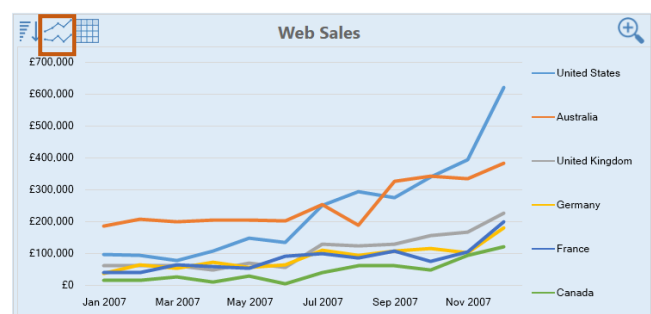
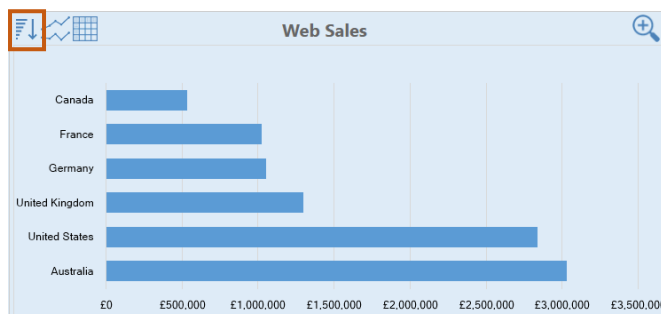


Viewports

Viewports are a dynamic view of another part of a workbook. They can be used to produce a consolidated view of a complex workbook, and can be useful in dashboards and in handling some of the layout challenges of variable length or width reports. For example, you can present a range of data held on one worksheet within a much smaller area on another worksheet. They are scrollable and retain interactivity. If the viewport contains a grid, that will still be drillable and editable even through the viewport.



Viewports can also reference Excel charts directly or as part of a range. Paged Viewports allow for simple icon-led navigation between several Viewport. Users can click an icon to change the viewport currently being displayed within the paged viewport as shown below by the highlighted icon.

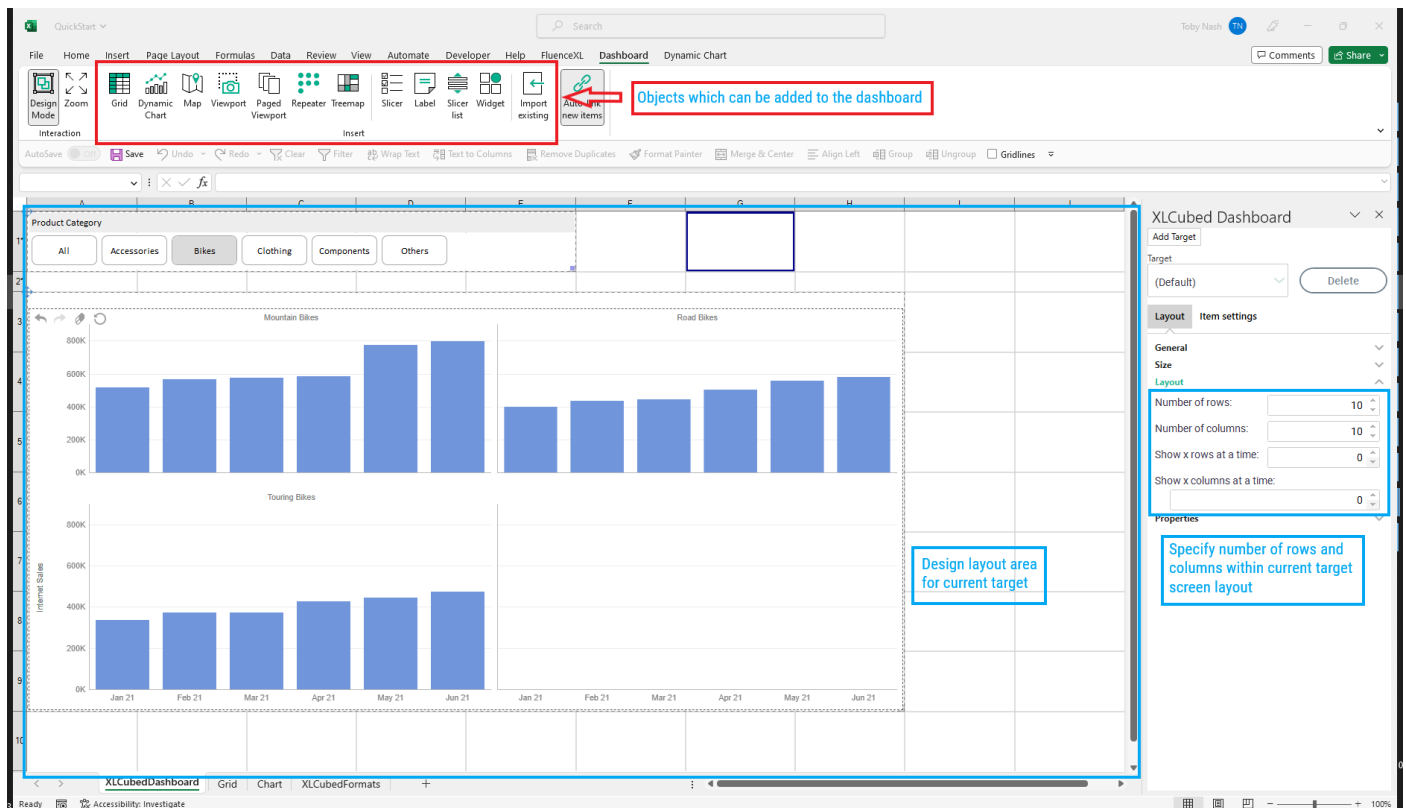


Viewports, Paged Viewports and Popup Viewports are inserted from the Visualise ribbon item.

Dashboard Sheets

Dashboard Sheets let users build responsive dashboards and reports which resize based on the screen of the user viewing them and are particularly useful when reports will be published to FluenceXL Web. They can be optimised with different layouts depending on screen size and orientation. Objects are auto-linked together as they are added to the dashboard, the default links can be overridden where required.

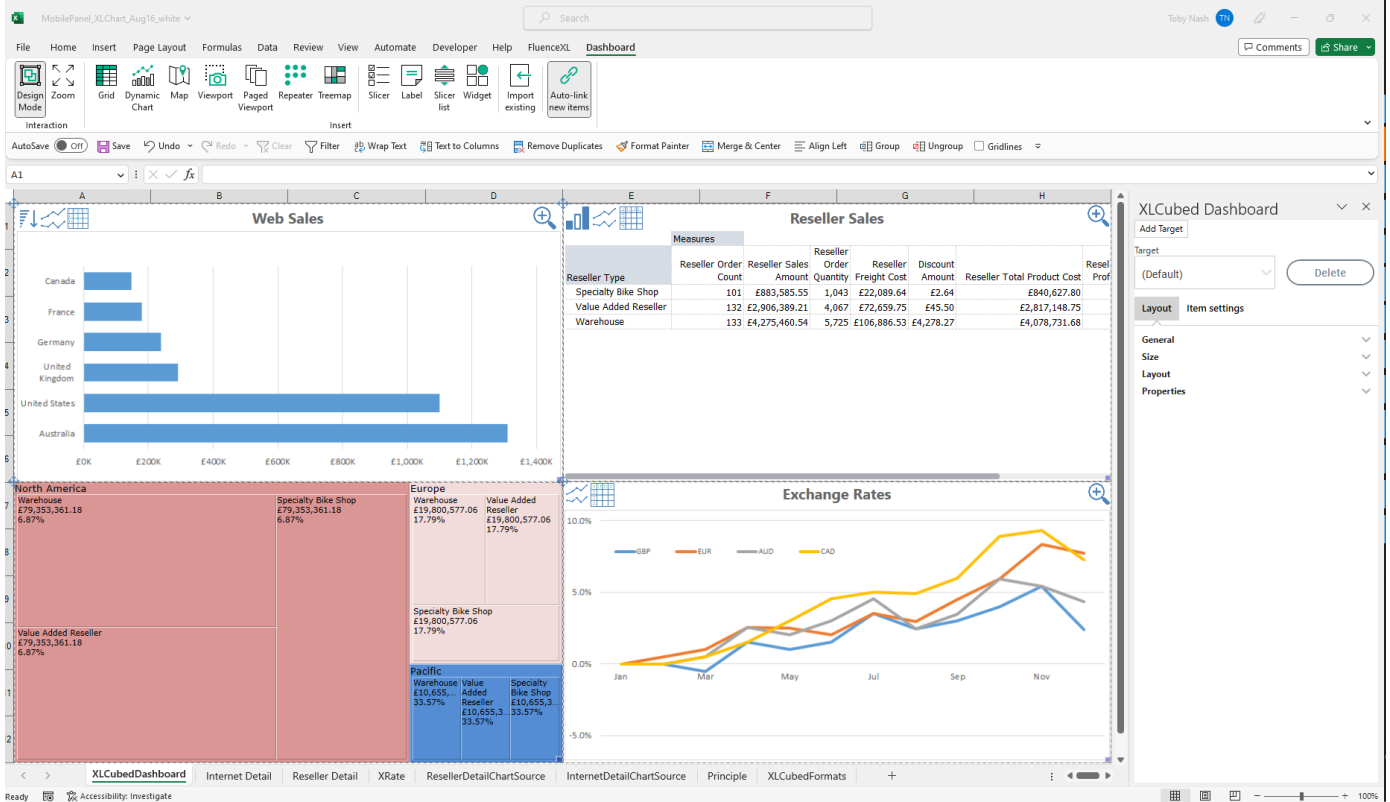
Dashboard sheets are available under the Visualise group in the FluenceXL Ribbon. The design environment is shown below. When adding Grids, Small Multiples etc. the designer is the same as when inserting them on a standard Excel sheet. Labels are specific to Dashboard sheets and allow for positioning of titles etc. within the dashboard. Grids and FluenceXL charts can be added directly to the dashboard, and ViewPorts allow for the display of any highly formatted Excel charts or tables within the dashboard. Dashboards have a design mode and a runtime mode which is toggled through the Design Mode button on the Dashboard ribbon.



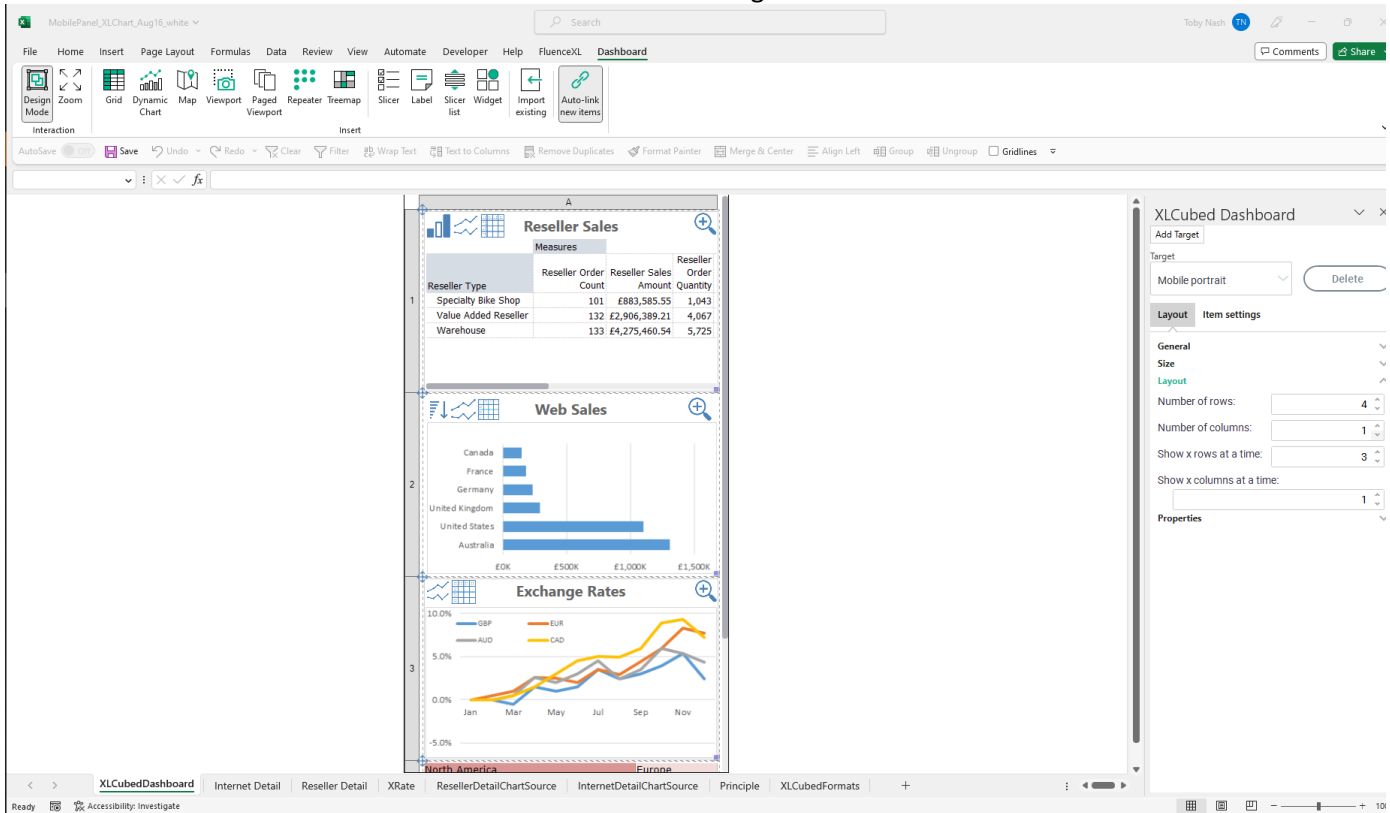
Objects added to the dashboard will be positioned starting at the active 'cell' and can then be moved and sized as required. Links are automatically created between objects but can be overridden where required.

Targets allow for optimisation of the report layout based on the type and size of the device it is being viewed on. The concept is that the dashboard itself is developed once, and can then be layout optimised per device type.

Desktop Target View



Portrait Mobile Target View



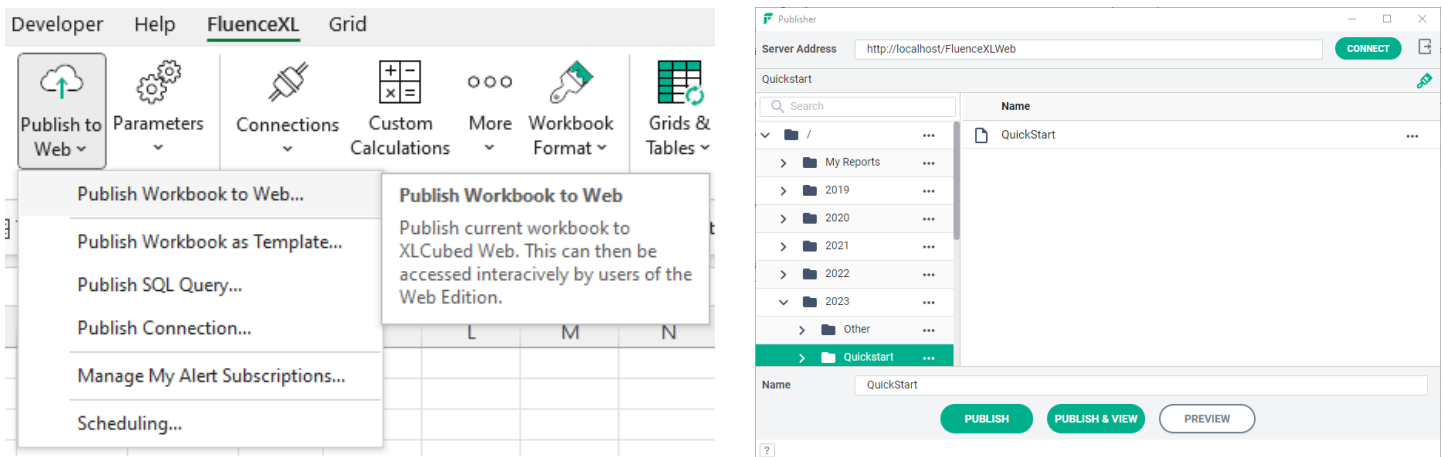
Web Publication

Reports, Dashboards or pieces of analysis developed in FluenceXL can be shared with other users by:

- Saving and sharing the Excel file as normal with other users who have the FluenceXL add-in.
- By publishing the report to FluenceXL Web. Web users can still use the report interactivity but do not need the FluenceXL add-in.
- FluenceXL Web can optionally be embedded in Power BI, SharePoint and custom portals.

To publish reports from FluenceXL you will need to have access to an instance of FluenceXL Web. The publication process itself is very straightforward.

First open the report and select the FluenceXL **Publish to Web** ribbon item in Excel:



The dialog allows you to connect to an FluenceXL Web server and select where the current report should be published. The detailed steps are outlined below:

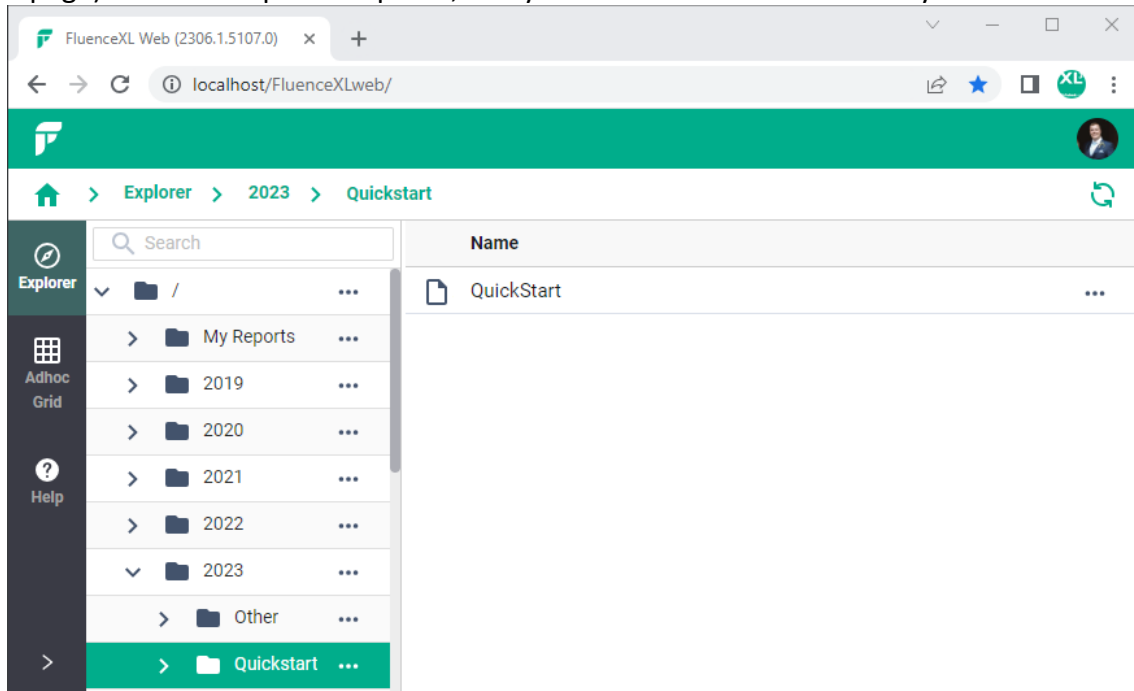
- **Connect to the server you want to publish to:**
Enter the name of the FluenceXL Web server you want to connect to in the **Server Address** field. This will be in the format: <http://<servername>/FluenceXLWeb> where <servername> is the name of the web server FluenceXL Web has been installed on.
Click **Connect** and the folders available on the server will be displayed in the right hand side of the dialog.
- **Enter the Report details:**
Type in the **Name** that you want to give the report.
- **Select where to publish:**
Select the folder you want to publish the report into. Existing reports are also shown in the tree. If an existing report is highlighted, then FluenceXL will attempt to replace it.
- **Publish:**
Click the Publish button to publish the report to the server.
Alternately click the Preview button to allow you to view the report in a browser without

permanently publishing it to the server.

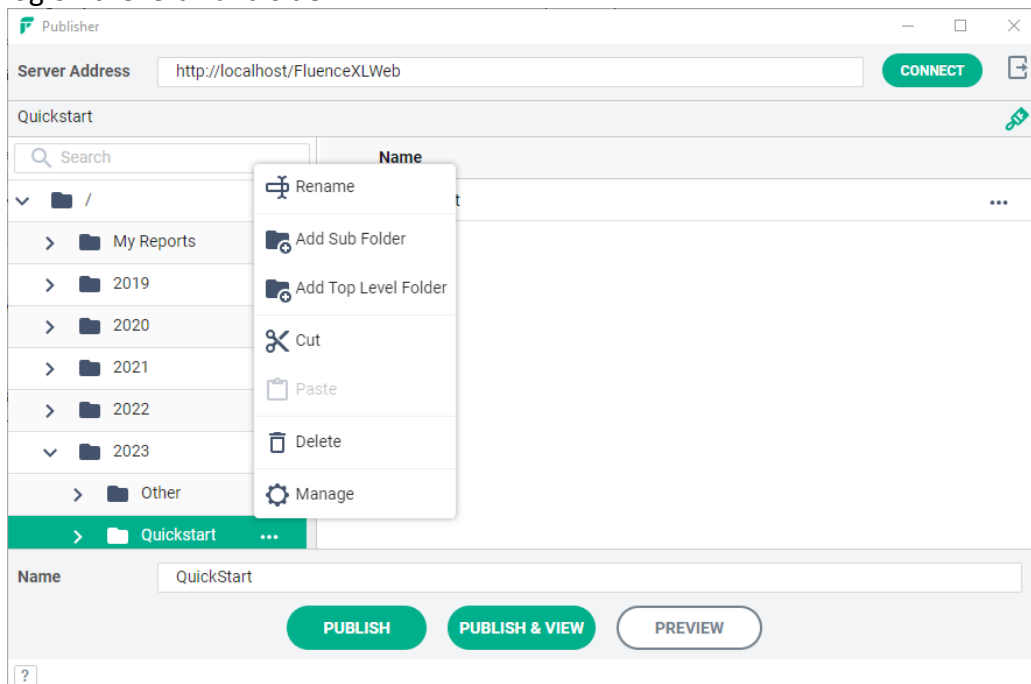
- **Run the published report in your browser**

In your browser, navigate to the same URL which you published the report to (<http://<servername>/FluenceXLWeb>) and you will see the Homepage:

On the left hand side, open the folder you published to and you should see your report listed (if not, refresh the page). Click the report to open it, and you can now use it interactively on the Web.



The Repository folder structure can be maintained either directly on the web server (the 'Repository' folder contained within the FluenceXL Web website folder), or via the FluenceXL publication dialog, using the 3 dots dialog on the left-hand side.

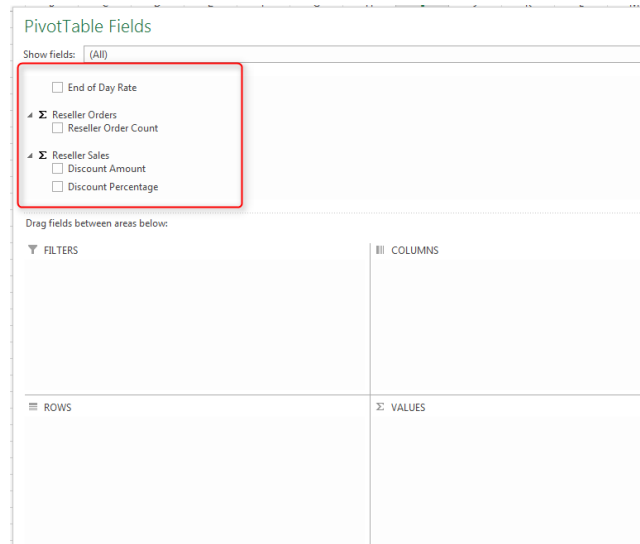


FluenceXL for Pivot Table users

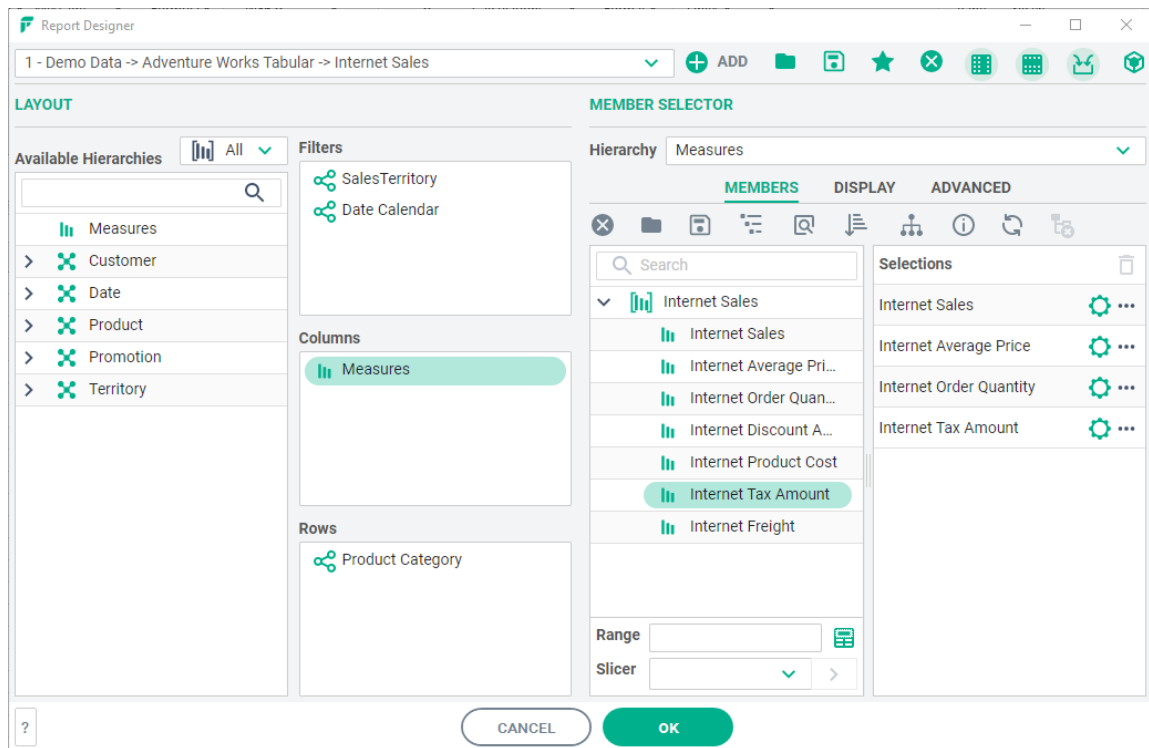
Many users find FluenceXL when looking for alternatives to Pivot Tables which can give more flexibility and functionality. It's generally a quick transition, but there are a few key differences in how Pivot Tables and FluenceXL interacts with Analysis Services which are detailed below.

Handling of 'Measures'.

Pivot tables lists all the Measures at the top of the Task pane, and you check the relevant box to select the required measure. If you select two measures they will be displayed on Columns.



FluenceXL lists Measures at the top of the Available hierarchies. You can then drag Measures onto either 'Filters', 'Columns' or 'Rows' as required. To select a specific measure, click on 'Measures' and drag the required selections to the right of the Member selector as shown below.



This inserts a Grid as below:

	B	C	D	E	F	G
21						
22						
23		SalesTerritory	All			
24		Date Calendar	2021			
25						
26						
27			Measures			
28		Product Category	Internet Sales	Internet Average Price	Internet Order Quantity	Internet Tax Amount
29		-All	\$ 9,770,900	\$ 303	32,265	\$ 781,672
30		- Accessories	\$ 407,050	\$ 19	21,067	\$ 32,564
31		+ Bike Racks	\$ 22,920	\$ 120	191	\$ 1,834
32		+ Bike Stands	\$ 20,670	\$ 159	130	\$ 1,654
33		+ Bottles and Cages	\$ 33,518	\$ 7	4,708	\$ 2,681
34		+ Cleaners	\$ 4,174	\$ 8	525	\$ 334
35		+ Fenders	\$ 27,211	\$ 22	1,238	\$ 2,177
36		+ Helmets	\$ 132,752	\$ 35	3,794	\$ 10,620
37		+ Hydration Packs	\$ 23,536	\$ 55	428	\$ 1,883
38		+ Tires and Tubes	\$ 142,270	\$ 14	10,053	\$ 11,382
39		+ Bikes	\$ 9,162,325	\$ 1,578	5,805	\$ 732,986
40		+ Clothing	\$ 201,525	\$ 37	5,393	\$ 16,122

Hierarchy Selections

When you select a hierarchy in Pivot Tables and place it on rows or columns, it will automatically display one level down from the default member. This may or may not be what the user wants.

FluenceXL will show the default member (normally the 'All' member) until the user makes a selection. When one or more members are selected you can click the drop down menu as shown below and choose 'children', or 'descendants at a level' etc. to specify dynamic selections which will change with the data.

