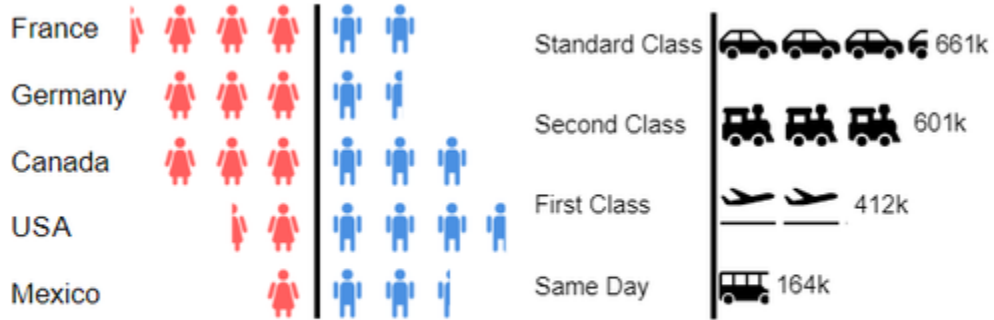


## User Manual for the graphomate pictograms for Tableau



Version 2020.3 – as of August 2020

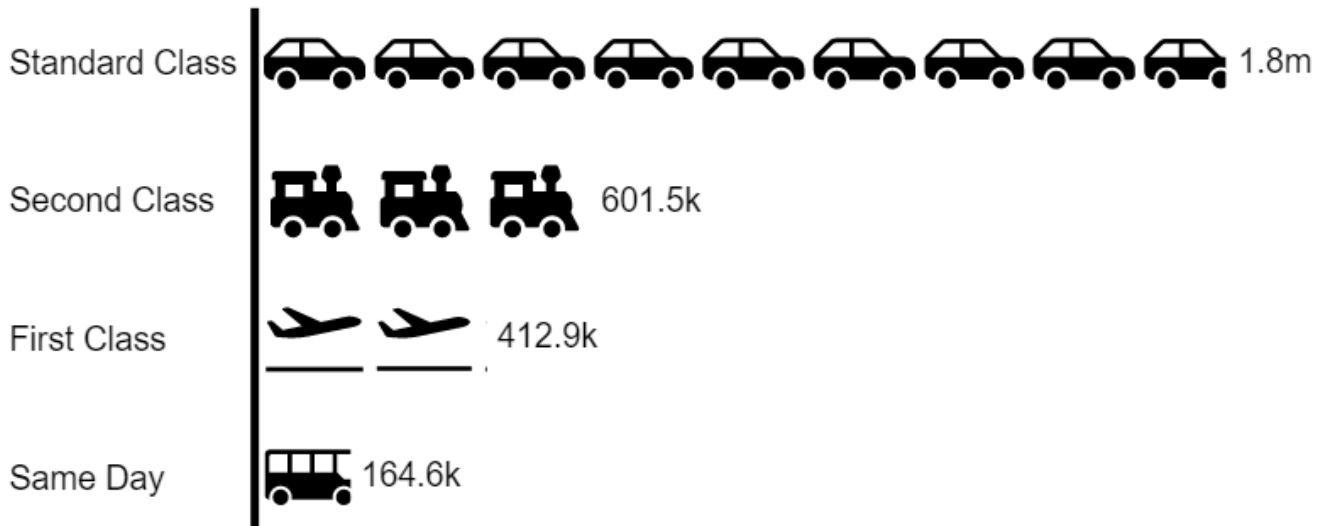
<https://www.graphomate.com>

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## Introduction

Pictograms can be used to present "complex" facts quickly and understandably. Our pictograms therefore enrich your diagrams and dashboards with additional semantic elements. In the case of product groups, for example, the viewer can immediately recognize which products are involved. The quantification of important key figures in the form of pictograms also facilitates the comparison between different product groups.



When dealing with pictograms, it's very likely to get to know the concept of Isotype. Otto Neurath and his team investigated in Austria from the 1920s onwards how they could make social and economic facts accessible to the working population with simple pictograms, often accompanied by a lower level of education.

The so-called isotype developed from the *Wiener Methode der Bildstatistik*. This acronym is composed of International **S**ystem of **T**ypographic **P**icture **E**ducation. This was the first time that facts were conveyed in a more comprehensible, neutral and uniform way. The system includes a defined set of pictograms as well as a grammar. It determines the way the pictograms are combined.

In the following we describe the properties of the graphomate pictograms and the possibility to configure them in our user interface. This user interface is almost identical in all BI front ends - Power BI, Tableau and the SAC. Formatting settings of graphomate pictograms can be stored on the graphomate server and used in other environments.

## Installation

### Adding the graphomate extensions to a Tableau Dashboard

1. Save the graphomate.trex file in a folder.
2. Open a Dashboard worksheet in a Tableau workbook.
3. In a Tableau Dashboard, in the *Objects* section, select the *Extension* entry and drag it to the drawing area.
4. In the “Choose an Extension” dialog box, do either of the following: Click *My Extensions*, and navigate to a .trex file you previously downloaded.
5. If prompted, allow the dashboard extension access to data in the workbook.
6. You can now use the extension

To use the graphomate extensions via Tableau Server or Tableau Online, the extensions must be added to the whitelist. [Link \(Documentation Tableau Online\)](#)

After expiration of the trial versions the graphomate extensions in the Tableau Dashboard can not be updated. If you want to continue using the trial dashboards after purchasing the licenses, the extensions have to be loaded into the dashboard, linked to the data and configured again.

## Quick Start





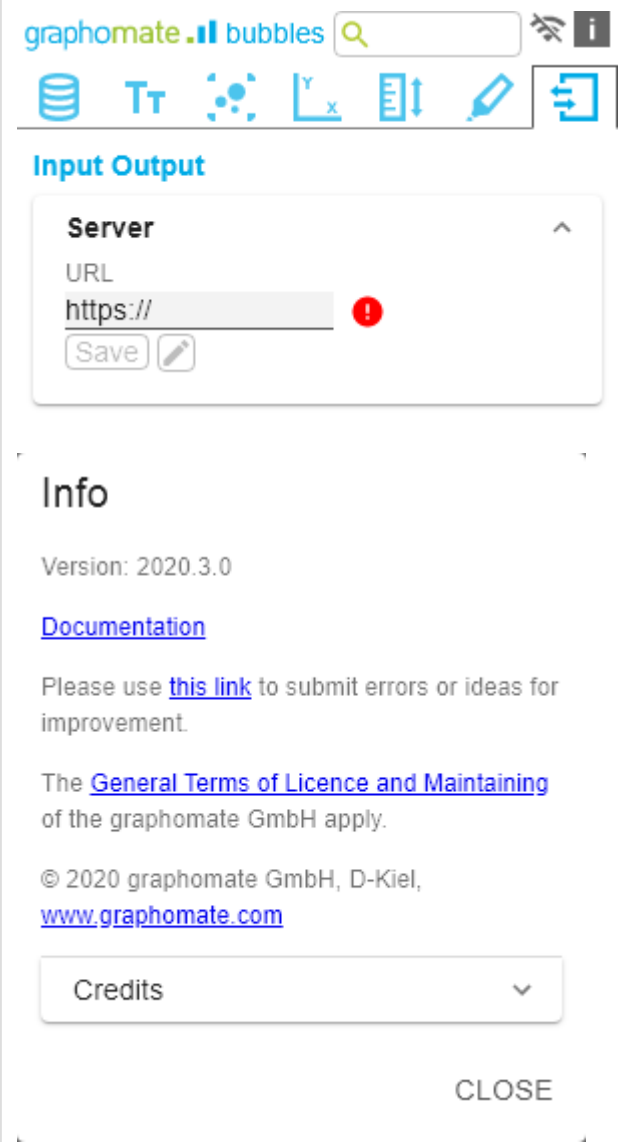
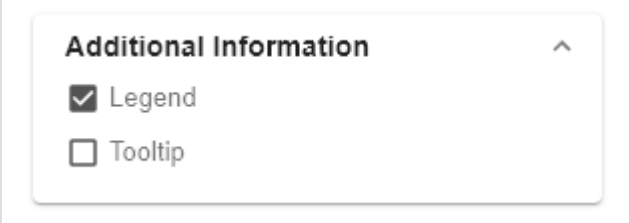
### First Steps

1. Add a tableau worksheet to your dashboard, which should serve the graphomate component as data basis. graphomate component does not work without this worksheet, because there is no data for visualization otherwise.
  2. Open the graphomate property sheet by clicking on "Configure..." on the graphomate component.
  3. The graphomate property sheet should have opened.
  4. Use the Data Tab to select a tableau worksheet. The data is then transferred to the graphomate component.
  5. Use the graphomate property sheet to influence the configuration of the graphomate component.
- tableau.mp4

## graphomate property sheet (GPS)

- Start Tab
- Axes Tab
- Labels Tab
- Input Output Tab

The following usage structure can be found in all graphomate extensions with the graphomate property sheet (GPS):

<p><b>SEARCH FIELD</b></p> <p>Use the search field to quickly find a setting (example "Title") and change it.</p> <p><b>CONNECTION TO THE GRAPHOMATE SERVER</b></p> <p> active connection to graphomate server</p> <p> no active connection to the graphomate server</p> <p><b>INFO TAB</b></p> <p>In the header of the GPS there is an info symbol (  ). Click on the  icon to open a tab with relevant information:</p> <ul style="list-style-type: none"> <li>• the version number of the installed extension (important information for the support)</li> <li>• link to the graphomate Support Desk</li> <li>• to the general terms and conditions</li> <li>• to the graphomate website and</li> <li>• a list of the software libraries used (Credits)</li> </ul>	 <p>The screenshot shows the top part of the 'graphomate .ll bubbles' interface. It includes a search bar with a magnifying glass icon, a Wi-Fi icon indicating connection status, and an info icon. Below this is a toolbar with icons for database, text, nodes, axes, and a list. The 'Input Output' section is expanded, showing a 'Server' configuration box with a URL field containing 'https://', a 'Save' button, and a red error indicator. Below that is an 'Info' section with version '2020.3.0', a 'Documentation' link, and a 'Credits' dropdown menu. A 'CLOSE' button is at the bottom right of the info section.</p>
<p><b>CHECKBOXEN</b></p> <p>An active property is indicated by a white check mark in the checkbox. To deactivate it, click on the checkbox again.</p>	 <p>The screenshot shows the 'Additional Information' section of the interface. It contains two checkboxes: 'Legend' which is checked, and 'Tooltip' which is unchecked.</p>

**COLOR PICKER**

You can enter the color value as HEX code or click on the colored circle.

Use the Color Picker or enter color values as HEX, RGB, or HSL code. You switch between these color models using the small arrows on the right side of the color picker.

**Deviations** ^

Good Color  
● #8CB400

Bad Color  
● #FF0000

Invert

**Good Color**

#8CB400

HEX

OK

**ADDING NEW ELEMENTS TO LISTS**

Click on the + icon to create new elements in a list.

**REMOVING ELEMENTS FROM A LIST**

Hover over the element to delete an object. The following symbol appears . Click on the icon to delete the selected entry.

**Scenario Definition** ^

+

- AC
- PP
- BU

Import / Export  
W3sic2hvcnQioiJBQyIsIr

**FILTER OPTION**

In some cases, it is necessary that several settings are only applied to certain key figures, dimensions or dimensional characteristics. You can use the filter option to define the combination to which the setting is to be applied.

In the example on the left, the desired setting is only applied to the key figure "budget". This can be, for example, a certain number formatting, a scenario or a certain icon for displaying the key figure.

Filter states can be defined in the following settings of graphomate extensions:

- graphomate matrix
  - Value Format
  - Calculations/Deviations
  - Scenario Assignment
  - Bar Chart Assignment
  - Pin Chart Assignment
  - Background Bar Assignment
- graphomate bubbles
  - Value Format
- graphomate pictograms
  - Pictograms/Icon Assignment

**Measures**

Dimension

Measures ▼

Members +

budget ▼

OK

**Input mode: Field / comma separated list (csv)**

Properties with the CSV symbol allow the definition of settings on the graphomate property sheet in two variants. The mode can be changed by clicking on the CSV symbol. The following modes are available:

1. per field: The value is entered per field. After one field has been filled, another field is created automatically.
2. As a list: The entry is made as a comma-separated list.

Example: Application of the scenarios to elements of a series (see picture)

The first series contains two forecast values (FC) and two budget values (BU). The second series contains only values from the previous period (PP). You can enter the assignment of the scenarios as follows:

Variant per field for series 1: FC (field 1), FC (field 2), BU (field 3), BU (field 4)

Variant as list for series 2: PP,PP,PP,PP,

**Scenario Assignment**

Scenarios 1 CSV

FC FC BU BU

Scenarios 2 CSV

PP,PP,PP,PP,

Scenarios 3

▼

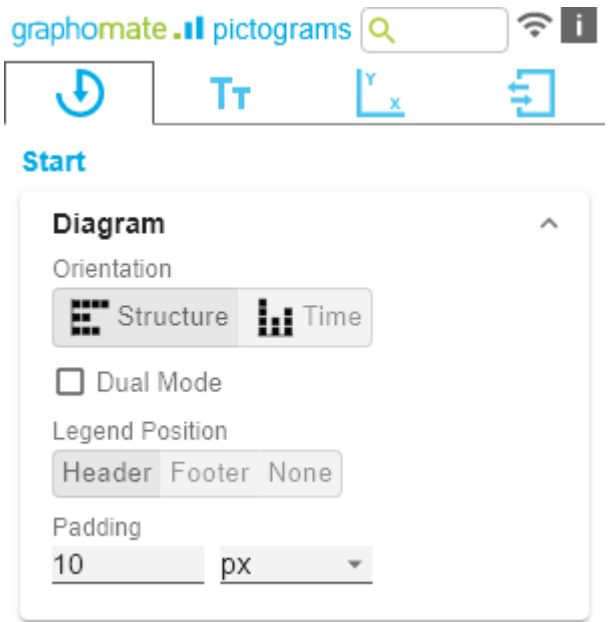
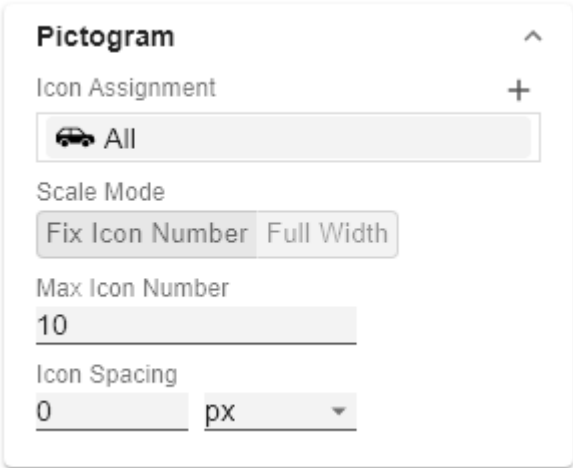
Scenarios by Series +

no items

- Scenarios In Axis
- Scenario Legend Enabled
- Scenarios In Deviations



## Start Tab

<p><b>DIAGRAM</b></p> <p><b>Orientation</b></p> <p>You can use the pictograms horizontally and vertically aligned:</p> <ul style="list-style-type: none"> <li>• horizontally for developments over time (<i>Time</i>),</li> <li>• vertical for structural comparisons (<i>Structure</i>).</li> </ul> <p><b>Dual Mode</b></p> <p>When Dual Mode is activated, the first two measures are displayed on the opposite axis.</p> <p><b>Legend Position</b></p> <p>Specify the position of the legend that represents the value per icon. Possible settings are Header (top right), Footer (bottom right) and None (no legend).</p> <p><b>Padding</b></p> <p>Sets a border around the pictogram. Select a CSS unit from the list (such as <i>10px</i>, <i>10em</i>).</p>	 <p>graphomate .nl pictograms</p> <p><b>Start</b></p> <p><b>Diagram</b></p> <p>Orientation</p> <p>Structure Time</p> <p><input type="checkbox"/> Dual Mode</p> <p>Legend Position</p> <p>Header Footer None</p> <p>Padding</p> <p>10 px</p>
<p><b>PICTOGRAM</b></p> <p><b>Icon Definitions</b></p> <p>Each entry represents an icon definition. This consists of the attributes <i>Source</i> and <i>Filter</i> as well as <i>Description</i>. Under <i>Source</i> you can select the source for an icon. In addition to preselected icons<sup>1)</sup>, you can provide your own icon under the <i>Custom</i> entry. This can be a valid URL or data URL. The most common image formats (.svg, .png, .jpeg and .gif) are supported. For performance reasons, the selected image files should not be too large (ideally only a few kilobytes), since they must either be loaded via external requests or, in the case of a data URL, included in the source code.</p> <p>Under <i>Filter</i>, select the dimension and the associated members for which the icon is to be drawn. If you do not set a filter, the icon is applied to all data points, since there is no restriction. If there is an overlap between icon definitions regarding dimensions and members, the last created icon definition has priority.</p>	 <p><b>Pictogram</b></p> <p>Icon Assignment +</p> <p>All</p> <p>Scale Mode</p> <p>Fix Icon Number Full Width</p> <p>Max Icon Number</p> <p>10</p> <p>Icon Spacing</p> <p>0 px</p>

The *Description* option allows you to define your own description for the icon definition, which then appears together with the selected icon in the list of created icon definitions. If no *Description* is set, the selected dimension members are displayed next to the icon (if there is no restriction, All is displayed).

1) It is recommended to use the structural mode for the pre-selected icons.

**Icon Definition Custom Icon URL**

If the option 'Custom' is set in the Icon Definition under Source, an additional text field appears with the title Custom Icon Url. There are two ways to provide your own icon:


1. Img-URI: Geben Sie eine externe URL an, unter der das Icon gespeichert ist.

External Image-URL  
 Example: img url (svg bild by wikipedia commons)  
  
<https://upload.wikimedia.org/wikipedia/commons/8/89/Dog.svg>

2. Data URL: With the help of a Data URL external sources can be directly integrated into html. In order for the image to be used in the pictograms, the data-url must be specified in the following format: data:[<MIME-Type>];base64,<Data>

Representation of a red dot:

```
"data:image/png;base64,iVBORw0KGgoAAAANSUHEUgAAAAoAAAAKCAyAAACNM+s+9AAAABGdBtUEAALGPc/xhBQAAAA1wSFlzAAALEwAACxMBAJqcGAAAAAd0SU1FB9YGARc5KB0XV+IAAAAdDEVYdENvbW11bnQAQ3JlYXRlZCB3aXRoIFR0ZSBHSU1Q72Q1bgAAAF1JREFUGNO9zL0NglAAxPEfdLTs4BZM4DIO4C7OwQg2JoQ9LE1exdlYvBBEz7jqch9//q1uH4TLzw4d6+ErXMMcXuHWxId3KOETnnXXV6MJpcq2MLaI97CER3N0vr4MkhoXe0rZigAAAABJRu5ErkJggg=="
```


 All

Source

Filter (optional) +

Description (optional)

OK

 Action movies

Source

Custom Icon URL

Filter (optional) +

Description (optional)

OK

genre

Dimension

Members +

OK

The expression `data:` indicates that the URL is a data URL. The MIME type (in the example: `image/png`) defines the type of content ;`base64` specifies the encoding of the data. After a `,` (comma) follows the actual image as base-64 encoded string. Under the Google search 'data-url generator' you can find various online services that encode image files as base64 encoded strings and then provide them as data URLs.

Tip: Office 365 contains an extensive collection of categorized pictograms that can be saved locally as vector graphics (svg).

### **Scale Mode**

Determines the scaling mode for the pictograms.

*Fix Icon Number*(Default): Space is reserved for `n` (given by the Property *Max Icon Number*) icons, regardless of whether `n` icons are actually needed to display the maximum value. This scaling mode is recommended if the values can change dynamically over several orders of magnitude (e.g. during filtering), since the size of the icons does not change.

*Full Width*: The space reserved for the icons depends on the number of icons needed to display the maximum value. The required number is always less than or equal to the value from the property *Max Icon Number*. This mode is more suitable for static representations and uses the full width for the representation of the icons.

Note: The size of the **square** icons is exclusively based on the given width in both the temporal and structural representation of the pictograms.

### **Max Icon Number**

Determine the maximum number of icons per data point. This affects the value that the icon represents. The system tries to find a value for each icon that makes the most sense so that the actual maximum number of icons is less than or equal to the number you specify.

### **Icon Spacing**

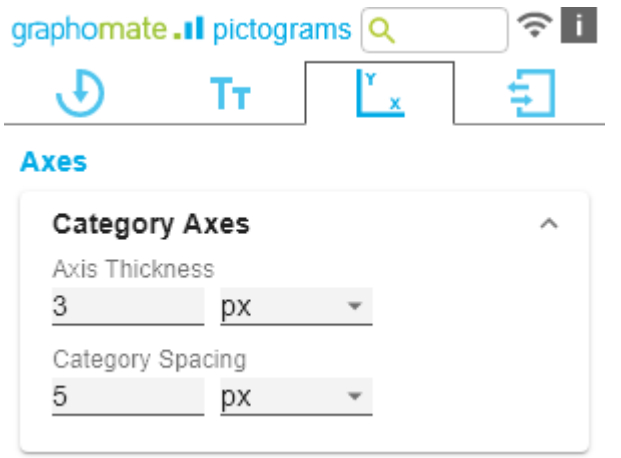
Defines the distance between two icons (within a data point). Select a CSS unit from the list (such as `px,em`).

**TOOLTIPS**

If this check mark is ticked, tooltips will be displayed on the pictograms at runtime, providing detailed information for the corresponding element.

**Tooltips**  Enable

## Axes Tab

<p><b>CATEGORY AXES</b></p> <p><b>Axis Thickness</b></p> <p>Specify the width of the category axis here. Select a CSS unit from the list (such as <i>px</i>, <i>em</i>).</p> <p>A specification of <i>0px</i> deactivates the category axis.</p> <p><b>Category Spacing</b></p> <p>Specifies the distance between two categories. Select a CSS unit from the list (such as <i>px</i>, <i>em</i>).</p>	 <p>The screenshot shows the 'graphomate .ll pictograms' application interface. At the top, there is a search bar with a magnifying glass icon, a Wi-Fi signal icon, and an information icon. Below the search bar are four icons: a circular arrow (refresh), a 'Tt' text formatting icon, a coordinate system icon with 'y' and 'x' axes, and a list icon. The 'Axes' settings panel is open, displaying two sections: 'Axis Thickness' with a value of '3' and a unit dropdown set to 'px', and 'Category Spacing' with a value of '5' and a unit dropdown set to 'px'.</p>
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## Labels Tab

### VALUE LABELS

Here you can select whether you want value labels displayed.

#### **Value Format**

With the Value Format you define the way the values are displayed in the diagram area. You access the configuration by clicking on the element in the list.

#### **Value Format Pop-Up**

Define the number format using the following options:

The screenshot shows the top navigation bar of the 'graphomate .ll pictograms' application. It includes a search bar, a Wi-Fi icon, and an information icon. Below the navigation bar are several icons: a refresh icon, a 'Tt' text formatting icon, a coordinate system icon (y and x axes), and a list icon. A 'Labels' configuration pop-up is displayed, featuring a title 'Value Labels' with an expand/collapse arrow. It contains an 'Enable' checkbox which is currently unchecked, and a 'Value Format' dropdown menu set to 'en-US number'.

- **Locale:** Defines abbreviations, decimal and thousand separators for the respective language. You can choose between *en*, *de*, *fr* and *auto*.
- **Format Type:** Defines the type of number output. You can choose between *number* (decimal number), *percent* (percentage) and *ordinal* (ordinal number).
- **Abbreviations:** Defines the type of abbreviations for all numbers to be formatted. You can choose between *mean* (abbreviation of the mean value), *min* (abbreviation of the minimum value), *max* (abbreviation of the maximum value), *auto* (best-suited abbreviation for the respective number), *trillion* (trillion abbreviation), *billion* (billion abbreviation), *million*, *thousand* and *none* (no abbreviation at all).
- **Negative Sign:** Defines how negative numbers are displayed. You can choose between *minus*, *parenthesis*, and *none* (no sign).
- **Prefix:** The input value is placed before the number.
- **Suffix:** The input value is placed after the number.
- **Thousands Separator:** Replaces the thousand separator set by the selected *locale*.
- **Decimal Separator:** Replaces the decimal separator set by the selected *locale*.
- **Total Digits:** Defines how many digits the number may consist of. *Total Digits* is prioritized over *Decimal Digits*.
- **Decimal Digits:** Defines how many decimal places of the formatted number are displayed.
- **Scaling Factor:** The value of each data point is multiplied by the entered number to scale values.
- **Zero Format:** When the checkbox is activated, any data value equal to 0 (the number zero) is replaced by the entered value.
- **Null Format:** Any data value that equals *NULL* (no value) is replaced by the entered value.
- **Error Format:** If a data value is undefined or the result of an arithmetic error such as dividing by 0 (zero), the data value is replaced by the entered value.
- **Rounding Method:** Defines the rounding method. You can choose between *half up* (23.5 24, -23.5 -23), *commercial* (23.5 24, -23.5 -24) and *trim* (23.5 23, -23.5 23).
- **Explicit Positive Sign:** Defines whether a positive number should always be preceded by a + (plus sign).
- **Description:** Defines a description for the set configuration.

## en-US number

Locale  
en-US

Format Type  
number

Abbreviations  
auto

Negative Sign  
minus

Prefix  
\_\_\_\_\_

Suffix  
\_\_\_\_\_

Thousand Separator  
 \_\_\_\_\_

Decimal Separator  
 \_\_\_\_\_

Total Digits (approx.)  
 \_\_\_\_\_

Decimal Digits  
1

Scaling Factor  
1

Zero Format  
 \_\_\_\_\_

Null Format  
\_\_\_\_\_

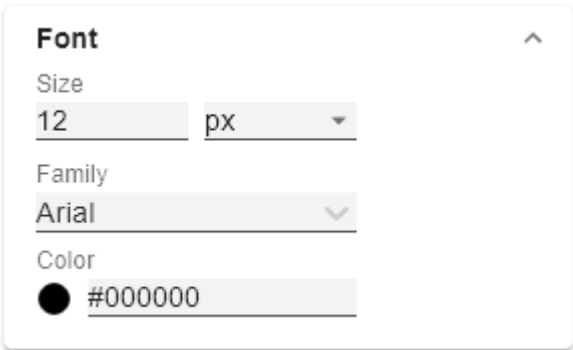
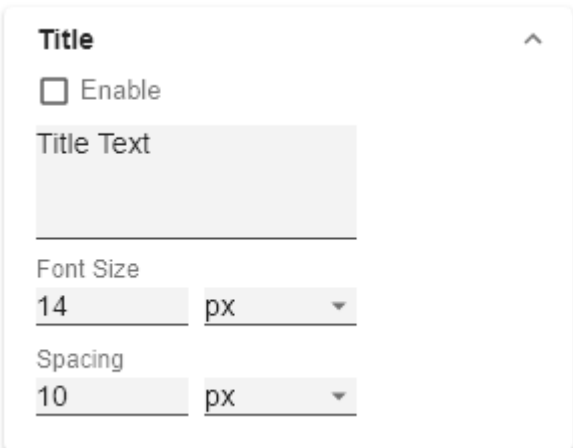
Infinity Format  
∞

Rounding Method  
commercial

Explicit Positive Sign

Description (optional)  
\_\_\_\_\_

OK

<p><b>FONT</b></p> <p><b>Size</b></p> <p>Specify the font size here. Select a CSS unit from the list (such as <i>px</i>, <i>em</i>).</p> <p><b>Family</b></p> <p>Define the global font. You can choose between <i>Arial</i>, <i>Tahoma</i>, <i>Lucida Console</i>, <i>Verdana</i> and <i>Calibri</i> or type in the name of a font which is installed on your system.</p> <p><b>Color</b></p> <p>Specify the font color here.</p>	
<p><b>TITLE</b></p> <p>If the <i>Enable</i> checkbox is activated, the title is displayed.</p> <p><b>Title Text</b></p> <p>Define a title for your pictogram here. Multiple-line texts are reproduced accordingly, i.e. the line break is adopted.</p> <p><b>Font Size</b></p> <p>Specify the font size here. Select a CSS unit from the list (such as <i>px</i>, <i>em</i>).</p> <p><b>Spacing</b></p> <p>Defines the distance of the header area to the pictogram. Select a CSS unit from the list (such as <i>px</i>, <i>em</i>).</p>	



<p><b>CATEGORY LABELS</b></p> <p><b><i>Suppress Repeating Category Labels</i></b></p> <p>Controls whether repetitive category labels should be hidden or displayed.</p> <p><b><i>Members in Categories</i></b></p> <p>Specify whether the names of the members should be displayed in the category labels.</p> <p><b><i>Measures in Categories</i></b></p> <p>Specify whether the member name of the measure/value dimension should be displayed.</p> <p><b><i>Hierarchical Category Spacing</i></b></p> <p>Determines the distance between the hierarchical display of category labels. Select a CSS unit from the list (such as <i>px</i>, <i>em</i>).</p>	<div data-bbox="889 247 1458 583"> <p><b>Category Labels</b> ^</p> <p><input type="checkbox"/> Suppress Repeating Category Labels</p> <p><input checked="" type="checkbox"/> Members in Categories</p> <p><input type="checkbox"/> Measures in Categories</p> <p>Hierarchical Category Spacing</p> <p>5 px</p> </div>
<p><b>FOOTER</b></p> <p><b><i>Footer Text</i></b></p> <p>Here you can define a text that appears below the pictogram.</p> <p><b><i>Font Size</i></b></p> <p>Specify the font size here. Select a CSS unit from the list (such as <i>px</i>, <i>em</i>).</p> <p><b><i>Spacing</i></b></p> <p>Defines the distance between the footer area and the pictogram. Select a CSS unit from the list (such as <i>px</i>, <i>em</i>).</p>	<div data-bbox="889 953 1458 1402"> <p><b>Footer</b> ^</p> <p><input type="checkbox"/> Enable</p> <p>Footer Text</p> <p>Font Size</p> <p>14 px</p> <p>Spacing</p> <p>10 px</p> </div>

## Input Output Tab

The functions of this tab are used to exchange templates for the graphomate pictograms.

Connect to the graphomate server - a free component of graphomate GmbH - to store or load a graphomate pictograms template.

In this way you can exchange preconfigured graphomate pictograms designs between BI front ends that support the graphomate server.

Currently these are: Power BI, Tableau and SAP Analytics Cloud.

<p><b>SERVER</b></p> <p>Here you enter the URL of the graphomate server to which the component should connect and from which you want to save or retrieve templates.</p> <p>If you have entered the URL to the server, a green check mark indicates that a connection could be established.</p> <p>If another server is used later, the button next to the save button can be pressed and the server URL can be edited.</p> <p>The hyperlink "<i>Admin</i>" allows you to jump to the admin area of the graphomate server.</p>	
<p><b>TEMPLATES</b></p> <p>If the current settings are to be saved as a template, a new template name can be entered in the input field labeled <i>Create Template</i> and confirmed by clicking the <i>Save State</i> button. If the entered name complies with the naming convention, the template is saved on the server and a toast with the corresponding message is displayed in the lower part of the graphomate property sheet.</p> <p>However, if the entered name does not meet the expected naming conventions, an error message with the permitted characters is displayed accordingly.</p> <p>With <i>Choose Template</i> templates stored on the server can be retrieved and applied. To do this, the desired template must be selected and the <i>Apply</i> button must be pressed. If you want to delete a template, you have to select the template in the list and press the <i>Delete (garbage bin)</i> button. If changes have been made to the templates on the server side, you have to click the <i>Refresh</i> button. Changes should then be visible.</p>	

## Known Issues pictograms

There are currently no known known issues.

## Known Issues Tableau

- The Comparison Group is only supported in the Tableau Online version.
- Not supported
  - PDF Export
  - own CSS Classes
  - global scenarios, (These must be created per graphomate visual and can be made available via the graphomate server or the import/export string)
  - Scripting